



AASHTOWare Project Preconstruction™ AWP-PreCon

Version 4.2.1

VDOT Training Manual

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SUPPORT / HELP

Purpose	Name	Email	Phone Number
All PreCon Questions & Support	Customer Support Hub (VDOT only)	https://covgov.sharepoint.com/sites/VDOT-CON-IBASHelpDesk	
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AWP Preconstruction USER ACCESS

Access to AASHTOWare Project Preconstruction (AWP-PreCon) is through a VDOT SARA request only. Due the sensitivity of the software, all users must pass a required CHRC background check before access will be granted. Access is via a COV user account and the password must be updated routinely. Once a COV account & a background check is complete, a SARA request is submitted for AWP-Precon access with the appropriate role and control group assigned. The user's access in AWP-PreCon must match the permission level (Role) in SARA.

VDOT Users should submit questions and/or issues to the AWP Customer Support Hub
<https://covgov.sharepoint.com/sites/VDOT-CON-IBASHelpDesk>

External or Consultant Users should email the AWP-PreCon Administrator for assistance.

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1. GETTING STARTED


The AWP-Preconstruction software is a Web application designed to run on Google Chrome or Microsoft Edge. The Internet Explorer browser should not be used. To run AWP-PreCon successfully, please use the recommended settings below.

1.1.1 Internet Browser Settings

All users should use the Google Chrome browser when using AWP-Preconstruction, per the VDOT Information Security Officer dated 2/27/2020. Users will experience font and field issues when using the Internet Explorer browser, due to VITA security restrictions for Windows 10 fonts.

1.1.2 Navigation

This user's guide can be printed, allowing readers to navigate the document by using the table of contents, chapter numbers, and page numbers. Viewing this user's guide in pdf format provides additional opportunities for navigation.

 **Note:** Adobe Reader must be installed on your workstation in order to view this document as a pdf file. You can download the latest version of Adobe Reader from the Adobe website: <http://www.adobe.com/>


When you view the user's guide as a pdf file, you can use the Bookmarks panel on the left side of the Adobe Reader window to navigate within the document. The Bookmarks panel contains an outline of the section headings used in the document, similar to a table of contents. Bookmarks function like hyperlinks. You can click a bookmark to display the related page in the right pane of the Reader window.

The pdf version of the user's guide also contains hyperlinks throughout the text. You can click a hyperlink to view a different page that describes related features or tasks. Entries in the table of contents are also linked to the related pages in the document.

Finally, viewing the user's guide as a pdf file enables you to use the search features in Adobe Reader. To display the search field, click the **Edit** menu and click **Find**, or you can press CTRL+F. Type a word or phrase in the search field, and press Enter. Adobe Reader displays the first instance of the word or phrase you entered. You can click the **Next** and **Previous** buttons to view each additional instance.

1.1.3 Using Online Help

The AASHTOWare Project Help system provides a wealth of information immediately available to you while you work. Understanding how the Help system works makes it easier to find the information you need.

The Help system is *context sensitive*, which means that when you click the **Help** button  on a component in the software, the system provides information about the functionality of that component only. Each Help page provides links to other Help pages containing related information.

The Help system also contains topics that are more general in nature and not linked to a specific component in the software. You can navigate the entire Help system by clicking the **Contents** link in the top left corner of any Help page, or by clicking the **Help** button on the Menu Bar.

The Contents pane is organized by business category and uses expandable and collapsible books and pages to display the list of topics available in the Help system. This pane helps you navigate through the hierarchy of topics to find a desired category and subject.

Click a book to expand it, and then click the page you want to see. The system displays the page in the right pane of the browser window.

NOTE: the Online help is NOT VDOT specific, this training manual serves specifically for VDOT requirements.

1.1.4 Search

The Search pane provides a rapid full-text search of all the topics in the Help system. To display the Search pane from any Help page, click the **Search** button in the top left corner next to the **Contents** button. To perform a search, type your search criteria in the **Search** input field on the toolbar, and click the **Go** button. To search for a phrase, enclose the phrase in quotes in the **Search** field.

The system performs the search and automatically opens the Search pane, which displays a list of the topics in which the search text appears. Topics are ranked in order of best match. Click on a topic to display the page in the right pane of the browser window.

You can also perform a search in the Search pane itself by clicking on the **Search** tab.

1.2 Logging On & Off

VDOT's AWP-PreConstruction resides in a Cloud hosted environment and works in conjunction with VITA's Multi-Factor Authentication (MFA) also known as Okta, which provides a second authentication for all users.

Note: you must use the Google Chrome browser for this software.

To Log into AWP-Preconstruction:

1. Open Google Chrome and navigate to:

<https://vdot-pr-prod.infotechinc.com/>

2. Enter your credentials:

Username: **(Network ID)@vdot.virginia.gov**

Network ID is typically firstname.lastname

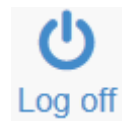
Password: **your temporary or current password from Vita**

3. Choose an OKTA Authentication method:

You have a choice of 3 methods:

- i. [Google Authenticator – Code provided on an App installed on your phone](#)
 - ii. [SMS Authenticator – Code sent via Text message](#)
 - iii. [Voice Call Authenticator – Code sent via a phone call](#)
4. Enter the code provided and click Verify
 5. The AWP Home screen opens and you are ready to enter your work in PreCon.

To Log Off, click the Logout Button, in the upper right corner.



1.3 The Dashboard

When you log on to the system, the software opens on the dashboard. You can also go to the dashboard at any time by clicking the **Home** button on the Menu Bar.

The dashboard contains one or more components. Each component is identified by a title set within a blue header bar. Each component provides access to the information and processes required for a specific area of your agency's work. The components you see on your dashboard are those that match the specific areas of responsibility assigned to your active role. See [Understanding Your Role](#) and [Using Components](#) for more information.

The following example shows the dashboard as it might appear for a system administrator. Keep in mind that some of the components shown in the example might not be available for you depending on your active role and which AWP modules are current.

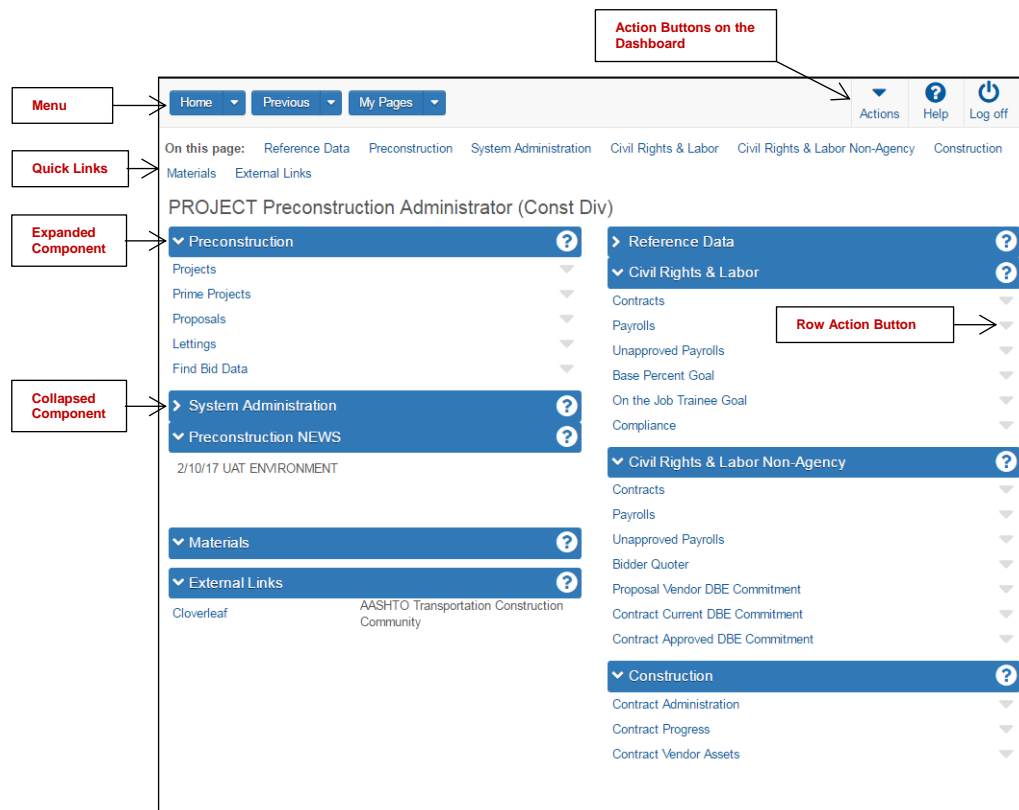


Figure 1 - The Dashboard

The dashboard includes these standard features:

- **Menu Bar** — The system displays the Menu Bar at the top of every webpage in the system. The buttons and menus on this bar help you to move quickly through the system to visit the pages and components you use most often.
- **Home Page News** — This component provides important VDOT specific information.
- **External Links** — This component provides links to websites you use outside of the AASHTOWare Project application.

1.3.1 Menu Bar

The system displays the **Menu Bar at the top of every webpage** in the system.

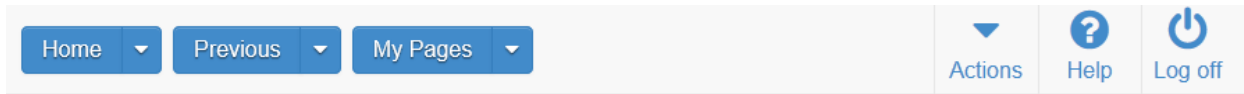


Figure 2 - The Preconstruction Menu Bar

The left side of the Menu Bar contains these buttons and menus:

- **Home** - Clicking this button takes you to the dashboard for your active role.
Clicking the down arrow opens the Home menu, which contains an indicator for your active role (bold text with a check mark) and lists all the roles assigned to you. This menu allows you to switch roles from any location in the system. When you switch roles, you remain on the component where you were working unless the new role does not have appropriate security rights, in which case the system takes you to the dashboard.
- **Previous** - Clicking this button returns you to the last page you visited in the system using your active role. Clicking the down arrow displays a list of links to the most recent pages you visited in your active role. Previous Activity Overview, you can access a much longer list of links to previously viewed pages. Clicking a link takes you to that location in the system.
- **My Pages** - Clicking this button takes you to the My Page Overview component, where you can manage frequently used (or *favorite*) pages for your active role. You can add pages as favorites from any location in the system by clicking the down arrow and selecting **Remember this Page**.

The right side of the Menu Bar contains these buttons and menus:

- **Actions** - Clicking this button opens a menu of actions you can take within the system. The actions that are listed are limited to those that are relevant for your active role. When you select an action, the system automatically takes you to the component in the system where the action can be performed.
- **Help** - If your agency has recorded agency Help, clicking this button takes you to a separate browser window containing online help for your active role. If agency Help has not been recorded, clicking this button takes you to the Welcome page of the standard online Help.
- **Log off** - Clicking this button ends your session.

1.3.2 Quick Links

Quick links are displayed in blue text below the Menu Bar and above the webpage title. These links allow you to quickly jump to application pages related to the current page. Your Role will determine which of these quick links you have access to.

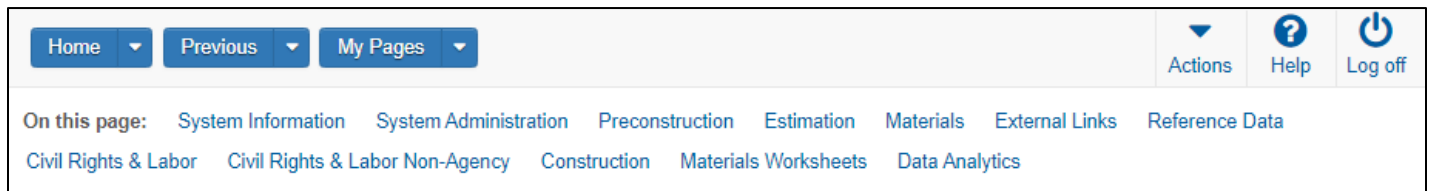



Figure 3 - Quick Links below the Menu Bar

If you are on a page that contains multiple components, quick links preceded by the label **On this page** are displayed for each component on the page. When you click one of these quick links, the system automatically scrolls the page to the location of the component.

1.3.3 Hypertext Links

Hypertext links can be located anywhere on an application component, including a field value, and are identified by blue text. When clicked, a link takes you to another component or page, usually one containing more detailed information than what is available in the current component. After you have clicked a link, it changes from blue to purple to remind you that you have already visited that link.

 **Note:** In a list, when you add a new row in which one of the field values is a hypertext link, the link is disabled until you save the new record.

1.3.4 Alternate Paths

Keep in mind that all of the various navigational elements, such as hypertext links, quick links, recent pages, and **Actions** menus, can all provide different ways of accomplishing the same task. The same command might be accessible from an **Actions** menu or as a link. For example, to access the Project Overview component, you can click the **Projects** link on the Preconstruction component, or you can select **Open** from the **Actions** menu on the Projects row. Both methods of navigation achieve the same result. Feel free to explore the system and find the ways of navigation that are best for you.

1.3.5 Using Bookmarks

You can bookmark specific pages in the software just as you would for any other website. However, if you have not yet logged on to the system, clicking a bookmark will take you to the login page rather than the bookmarked page.

1.3.6 Icons

Icons are small images throughout the system that either convey information or can be clicked to perform an action. For example, a red asterisk icon indicates a required field. An eraser icon in a Quick Find search box can be clicked to reset search criteria. This table shows some of the common icons used in the system:










Icon	Usage
	The eraser icon appears in Quick Find search boxes after criteria is entered. You can click the icon to reset the search criteria
	This magnifying glass icon at the left side of a field indicates an auto-complete field. Auto-complete fields display a filtered list of field values based on the first few characters you type. You can press Enter to show all values.
	A red asterisk indicates a field where data entry is required.
	The actions icon appears on Actions buttons that you can click to display an Actions menu. Actions menus provide access to commands and functions you can perform on data.
	The red X icon appears on Delete buttons that you can click to remove newly added rows that have not been saved. Clicking a Delete button removes the row immediately.
	The trash can icon appears on the Mark for Deletion button that you can click to remove saved rows. When you click the Mark for Deletion button, the button changes to an Undo button. The row is removed only when you save the changes.
	The undo icon appears on Undo buttons that you can click to reverse an action, such as deleting a saved row.
	The help icon appears on Help buttons that you can click to display the online Help system.
	The calendar icon is displayed on the right side of a date field. You can click the calendar icon to display a calendar where you can pick a date as the field value.

Figure 6 - System Icons

1.3.7 Viewing Previous Activity

The Previous Activity Overview contains a list of links to the most recent pages and components you visited using your active role. To display the Previous Activity Overview, click the down arrow on the **Previous** button on the Menu Bar, and select **View Previous Activity**.

Each row contains a link to the previously visited page, the date and time of the last visit, and an **Actions** button. The list is sorted by most to least recently visited.

To navigate to a previously visited page, click the **Page Title** link in the appropriate row. To delete an

activity from the list, select **Delete** from the **Actions** menu on the activity row.

To reverse the delete action, click the **Undo** button. Click **Save** when to apply your changes to the system

1.3.8 Viewing My Pages

The My Page Overview component contains a list of all the pages you have added to your My Pages list for your active role. To add a page to the My Pages list for your active role, first navigate to the page you want to add. Next, click the **My Pages** arrow on the Menu Bar, and click **Remember this Page**. The page is added to the My Pages list for your active role.

To display the My Page Overview, click the **My Pages** button on the Menu Bar. The component lists all of the pages you added when logged in with the same user role that is currently active.

To delete a page from the list, select **Delete** from the **Actions** menu on the page's row. When you are finished, click **Save** to apply your changes to the system.

1.4 Understanding your Role

A user *role* is a name associated with a collection of security access rights to the information contained in system components. Roles combine the permissions needed for several related tasks and allow you more efficient access to the parts of the system you need. Roles are designed by your agency and assigned to you by your system administrator.

All users of the system are assigned at least one security role. Many users have multiple roles, but you can only use one role at a time. Therefore, you are always limited to the security access rights of your *Active Role*.

To see which of your roles is currently active, click the down arrow on the **Home** button on the Menu Bar. The **Home** menu lists all of the roles that are currently assigned to you. Your active or current role appears at the top of the list with a check mark beside it.

You can switch your active role at any time by clicking another role on the **Home** menu. By selecting a different role, your permissions and security access are changed to reflect the areas you need to access to perform your duties in the new role. When you switch roles, the system continues to display the component where you were working unless the new role does not have appropriate security rights, in which case the system takes you to the dashboard.

If you are assigned multiple roles that have responsibilities for multiple approvals at different stages of the same workflow or approval process, you can only perform the approval corresponding to the authority of your Active Role. If the approvals are sequential, however, the system allows you to switch roles without leaving the approval component.

1.5 VDOT Control Groups



VDOT has an additional security level for all Users called **Control Groups**. The control group restricts user's access to see ONLY the Projects, Primes or Proposals in their unique control group. The control groups are assigned by VDOT District, Division or Consulting firm and maintained by the AWP-Preconstruction Administrator.

1.6 Using Components

The web-based AASHTOWare Project system displays information in application components. A *component* is a container for the information and business functions on an application webpage. Components are made up of elements such as fields, lists, and links. An application webpage can contain one or more components. Some components contain a list of tabs along the left side, each of which corresponds to a subset of information related to the component entity.

Note: To protect the information contained in your agency's system, components and webpages only display the information and action features for which your active role has been assigned access.

Each component includes these features:

- A blue header is displayed across the top of the component. The component header can contain several features, including the title of the component, a **Save** button, an [Actions](#) button, a Help button , and an expand/collapse button . The header might also contain contextual information related to the data contained in the component.
- A vertical scroll bar is included on the right side of any component that contains more content than can be viewed in the browser window.
- The most common elements found on components are fields in which information can be recorded.
- Most components contain lists of rows for a type of data, such as projects or proposals.
- Components with lists contain a variety of filters to make it easier to find specific rows. For more information about the different kinds of filters you can use and customize.
- Actions menus allow you to choose a function or process to perform on data. Most components contain multiple types of **Actions** menus. All Actions menus provide access to the files and links attached to the active entity row.
- Selection modal windows are used throughout the system to make it easier for you to add one or more rows of data to another entity (for example, to add projects to a proposal).
- Keyboard keys have limited functionality in components. The **Tab** key can be used to move from one field to the next, the **Enter** key can be used to scroll through a drop down list of values in a field, and the arrow keys can be used to scroll through lists of rows.
- Many components contain tabs arranged vertically on the left side of the component. Clicking each tab displays the fields and information on that tab. Clicking the **Save** button on a tabbed component saves the information on all of the tabs at once.

1.6.1 Working with Fields

Fields are the most common element found within components. Information can be recorded in fields. You can move from one field to another by pressing the **Tab** key or moving your pointer to the field and clicking the left mouse button.

A component can contain one or more of the following types of fields:

- *Text boxes* contain textual characters of any type. Some text boxes are capable of storing multiple rows of text. This type of text box includes a magnifying glass button on the right side of the box. Clicking this button opens a secondary text window that allows you to view and edit the text in a larger area. In this window you can use standard Windows editing commands like cutting (CTRL+X), copying (CTRL+C), and pasting (CTRL+V). When you are finished editing text, click the **Apply** button or press the Escape key to close the text window.



- *Numeric fields* contain only numeric characters. For all non-key numeric fields, the system automatically inserts and corrects the placement of commas and justifies values to the right when you leave the field.
- *Auto-complete fields* are like text boxes except that they automatically display a filtered list of field values based on the first few characters you type into the field. Auto-complete fields are indicated by a magnifying glass icon at the beginning of the field.




Pressing the **Enter** key without typing any characters returns the first ten rows in that list, displayed as a drop-down menu. To build the list, the system searches for ID and Name/Description values. By default, the first ten rows that match the entered criteria are returned. At the end of the returned list, there is a link to display the next available set of rows and a count of the total number of rows matching the search criteria. A scroll bar allows you to move up and down through the returned list. Pressing the up or down arrow key populates the field with the previous or next value in the drop-down menu. To populate the field, click the appropriate value from the drop-down menu.

- *Date and Date/Time fields* include a calendar button next to the field. Click the calendar button to display a calendar from which you can select a date to populate the field instead of typing the date manually.



The system default date format is MM/DD/YYYY and the system default time format is the 12-hour format with AM or PM designation.

 **Note:** The value you enter in a date field must be valid and reasonable (for example, it should not exceed 99 years in the future).

- *Drop-down list boxes* include a down arrow next to the field. Click the down arrow to display a list of possible field values.



Click an item in the list to populate the field. A scroll bar is available when needed to scroll through the list of values. Typing a letter cycles the values through all of the values that start with that letter. If there are no values that start with that letter, the value in the select box will not change. After you have clicked the scroll bar, pressing the up or down arrow key scrolls through the open drop down list.

- *Non-editable fields* display information without a text box. You cannot change the information in this type of field.
- *Check boxes* are square boxes that can be selected or cleared by positioning the mouse pointer over them and clicking the left mouse button. Check boxes are used to turn an option on or off.
- *Combined fields* display read-only pieces of information derived from multiple fields, but treated as a single field on the page.
- *Agency fields* look and behave like any other field, but have been customized for purposes specific to your agency. For this reason, these fields differ among agencies and, unless your agency has created custom agency Help, these fields are not documented in the online help system or this user's guide.


1.7 Overview, Summary, Tabs and Quick Links

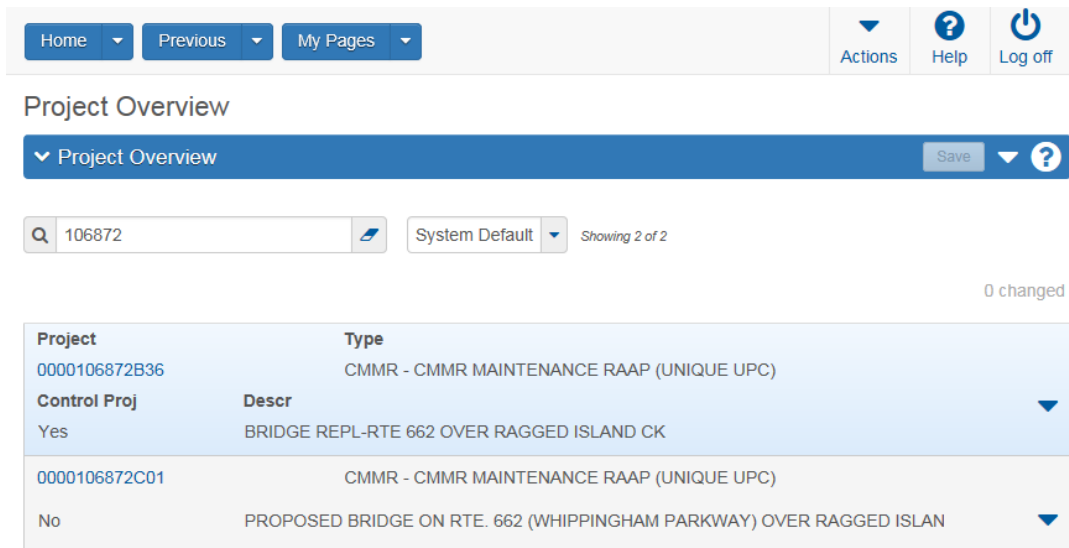
All the major components in Preconstruction are accessed the same way, with the same navigation method used for all of the major Preconstruction Components: Projects, Prime Projects, Proposals and Lettings.

1. You **start at the Dashboard** and **select the major component: Projects, Prime Projects, Proposals and Lettings**.
2. **Clicking on the component** will take you to that **component's Overview screen**. At this point, you can **search** for and **select** the specific Project, Prime Project, Proposal or Letting.
 - At the component's Overview screen you can also add a new Project, Prime Project, Proposal or Letting.
3. Once you have **found** your specific Project, Prime Project, Proposal or Letting, you can **click on its link** which opens in the **Summary screen** where information can be edited.
4. The Summary screen, as are most other screens, is arranged by Tabs, with each tab containing information related to the name of the tab.

1.8 Using the Quick Find Search Box

A Quick Find search box is a part of each component that contains a list.

- It **searches all rows** in the list for a string of text and then **displays only rows with fields containing that string**. The search begins automatically once the **third character** is entered and the text entered will remain there until you click the  button.



Project	Type
0000106872B36	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)
Control Proj	Descr
Yes	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK
0000106872C01	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)
No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAN

Figure 7 – Project Overview Search box

Follow these steps to use the **Quick Find search box**:

- Click in the Quick Find search box** for a list that you want to filter.
 - For example, in the Project Overview screen, the list being searched is the list of projects.
- Type the **string of characters** you want to **match** or use as a delimiter. The Quick Find filter is **not case-sensitive**.
 - After you type at least three characters and wait a moment, the system refreshes the list and displays the rows that contain the string of characters you entered.
 - The search criterion creates a temporary filter.
- If you want to **remove a row from the list of search results**, select **Exclude from Search Results** on the Actions Menu for that row.
 - The row is removed from the list of search results.**
 - You can exclude additional rows as needed.

2. PROJECTS

This chapter covers creating, changing and deleting projects. Please note that the specifics for entering Maintenance-funded projects are provided in Chapter 3.

2.1 Responsibility

Whether you, the user, actually initiate the creation of the project or wait to receive your copy from another user; can be determined by the three cases described below:

Case 1: The Project Manager will create the project and make copies to move to the control groups of the other designers/disciplines involved.

- Before copies of the project are sent out, a Prime Project should be created and all of the projects (both the original and any copies) associated to the Prime Project.

Case 2: The designer (who is not a Project Manager) will not create the project. They will find their copy of the project in their listing of projects once the Project Manager has made a copy in their control group. The designer will review this project as submitted to him/her and make appropriate revisions.

- If the designer does not have the project in their project listings, they should contact the Project Manager.

Case 3: The designer will create a new project(s) if not provided by the Project Manager and the Project Manager will be responsible for adding the project(s) to the Prime.

Case 4: For a “stand-alone” project (a project in which no other division will be involved), the designer will create the project(s). A Prime Project must be created, and the project(s) associated to it.

2.2 Field Entry and Case requirements.

All text entered in any and all fields in Precon must be UPPER case, that includes the letters in Project, Prime and Proposal ID's (names).

Please use *all UPPER CASE* for *ALL fields* in Precon.

2.3 Creating a New Project

The Add Project function creates a new Project and opens on the **General** tab, which allows you to add basic information for the new project.

- Click on **Projects** from the Preconstruction Dashboard located on the Home page.
- **Click the Project Overview Action button and click Add.**
- Fill in **only the required fields on the General tab.**
- Please see **Appendix A** for proper naming conventions.

*Please use **all UPPER CASE** for **ALL** fields in Precon.*

From the Preconstruction Dashboard, click on **Projects**. This will take you to the **Project Overview** screen.

The screenshot shows the Preconstruction Dashboard with a 'Projects' link highlighted in the 'Preconstruction' menu. An arrow points to the 'Project Overview' screen, where the 'Add' button in the 'Actions' bar is highlighted. Another arrow points to the 'Add Project' screen, where the 'General' tab is selected. The 'Add Project' screen shows various fields with red boxes and arrows indicating required fields: Project ID (with 'Appendix A' next to it), Project Description, Federal Project Number, State Project Number, Progress Schedule Category, Control Group, Item Code Table, Unit System, Project Type, Urban/Rural, FHWA 534, UPC Number, and Date of Estimate. A 'Save' button is highlighted in the top right corner. A red arrow points from the 'Save' button to the text 'Click Save When finished'.

Project Overview

Enter search criteria above to see results or Show first 10


The Add Project screen opens on the **General** tab.

Fill in all **Required** fields on the **General** **Tab ONLY**

Click **Save** When finished

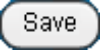
Figure 1 - Adding a New Project from the Project Overview screen

The Add Project screen requires entry of only the minimum required fields (on the General Tab ONLY) for the database to determine if the Project ID is unique, once the new project is saved then the user will complete the remaining fields and tabs.

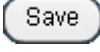
The following fields are required (indicated by a **red asterisk** ) when adding a new Project:

1. Project ID (See Appendix A for proper naming conventions)
2. Project Description
3. Progress Schedule Category (See Appendix H)
4. Control Group
5. Item Code Table
6. Unit System
7. FHWA 534
8. UPC Number (MUST be 8 digits, add leading zeros)
9. Date of Estimate (auto fills current date)

The **Add Project screen will display four tabs**: General, Counties, Districts and Points.

- The remaining Project Summary tabs – Road Segment, Bridge Segment and Workflow should not be filled in when Adding a project.
- To save the newly added project, click the **Save**  **button** found on the right side of the Add Project header.

Saving the Project and Correcting Errors

When the required fields on the General tab of the Add Project screen have been completed or when you are ready to save your data, click the **Save**  **button** to insure that all information entered has been saved.

- If you have completed all required field criteria satisfactorily and the Project ID (PCN) is a unique number, the project will be added/saved.
- The Project ID field can be changed as long as you are on the Add Project screen, even if the project was previously saved on that screen.
- Once you navigate away from the Add project screen, then you can only return to that project by way of the Project Summary screen. **The Project ID field will convert to display-only and cannot be changed.** This ensures unique Project ID's in the database.
- If a required field was not filled-in or incorrect data entered at a field which is supported with a reference table, an **Error** box will display. For example, if you left a required field blank or entered invalid data, you will see an **Error** box at the top giving information as to what field was left blank or contains an invalid value.
- If you attempted to create a project with a Project ID already in existence in the Precon database, you will see an **Error** box with the message that the Project ID (the primary key) is already being used by another project. A project could already exist in another control group with the Project ID you have just attempted to create. Precon will not allow duplicate Project IDs.

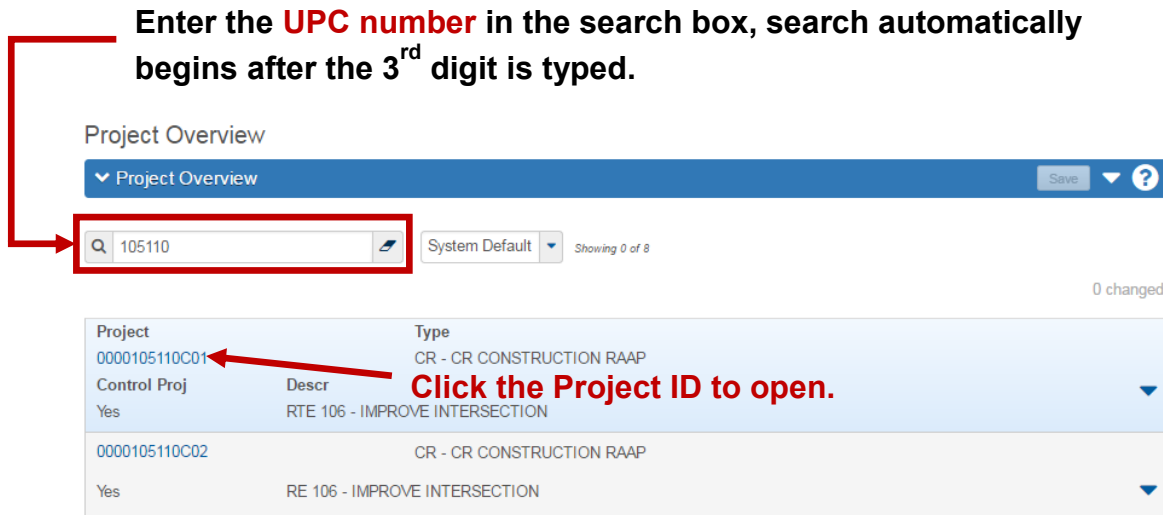
Note: when any errors are presented, they may **only show up one at a time**, so you may have to go through **several corrections** before a save is successful.

Errors must be corrected before the new project record will be saved/created.

2.4 Complete Remaining Fields

Now that you have created & saved your Project and the required fields on the General tab, **click the Overview link**, enter the new project's UPC Number and complete the remaining tabs; **Counties, Districts, Points, Road Segment, Bridge Segment** and **Workflow** tabs.

Enter the **UPC number in the search box, search automatically begins after the 3rd digit is typed.**



Project Overview

▼ Project Overview Save ?

Q 105110 System Default Showing 0 of 8 0 changed

Project	Type
0000105110C01	CR - CR CONSTRUCTION RAAP
Control Proj	Descr
Yes	RTE 106 - IMPROVE INTERSECTION
0000105110C02	CR - CR CONSTRUCTION RAAP
Yes	RE 106 - IMPROVE INTERSECTION

Click the Project ID to open.

Figure 2 - Retrieving a Project from the Project Overview Screen

To complete the Project:

1. Click on the **Overview quick link** at the top left of the Add Project screen or click on the **Home button** and then click on **Projects** from the Preconstruction Dashboard located on the Home page.
 - This will take you to the **Project Overview** screen.
2. Clear out the Search by **clicking on the eraser**, and then **enter the UPC Number**.
3. The **Project Summary** row will open. Click on the **Project ID** to open your Project.

2.5 Project Quick links

Quick links are displayed in blue text below the Menu Bar and above the blue component bar. These links allow you to quickly jump to application pages for the project.

All but the Wage Decisions quick links are discussed in later chapters.

- Users do not need to enter Wage decisions information at the project level.

That information is added in the Proposal. See chapter 9 for details

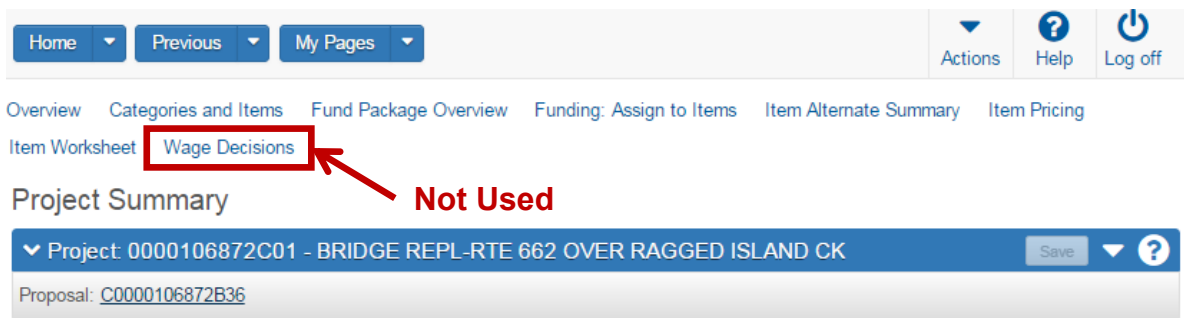


Figure 3 – Project Quick Links

2.6 General Tab

▼ Project: 0000110795C01 - SMARTSCALE - ADD LANE TO RTE 107 UNDER I-81 EXIT 35 Save ?

Proposal: C0000110795C01

General

Counties

Districts

Points

Road Segments

Bridge Segments

Workflow

Project ID **App. A**

0000110795C01

Project Description* **iPM**

SMARTSCALE - ADD LANE TO RTE 107 UNDER I-81 EXIT 35

City/Cnty **iPM/App. C**

086 - 086 SMYTH

Primary Project County ID

C086 - SMYTH

Pavement Type **Pg. 2-8**

ASPH - ASPHALT CONCRETE

Project Status **Pg. 2-9**

CON1 - CONSTRUCTION (1ST SUBMISSION)

Project Work Type **App. E**

CTL - CONSTRUCTION NEW TURN LANES

Project Item Total

1,277,423.55

UPC Number **MUST be 8 Digits!!**

00110795

Plan Reviewer / Estimator **Const. Division Staff**

C021 - JOANNA ABRAHAM

Designer **VDOT user or Company Name**

1D47

CHASE BUCHANAN

Job Number (C#,B#,CREW) **From State Project #**

C501 - C501 CONSTRUCTION PROJECT

Control Group* **Enter your unique Control Group #**

CD

IPM Interface

Project Validation **Last Step When Project is complete**

Item Code Table*

16 - 2016

Unit System* **Current Spec Book**

English

State Project Number **iPM**

0107-086-814 C501

Federal Project Number **iPM**

STP-086-1(068)

Federal Oversight **iPM**

NFO - NO FEDERAL OVERSIGHT

Federal ID **Numerals from Federal Project Number**

0861068

FHWA 534* **iPM**

14003

Controlling Project

☒ **For the Project Prime**

Primary Project District ID

0103 - BRISTOL / ABINGDON

Urban/Rural **iPM**

R - RURAL

Project Type **Pg. 2-11**

CR - CONSTRUCTION RAAP

Progress Schedule Category* **App. H**

3 - 3 - PROGRESS SCHEDULE CATEGORY

Date of Estimate* **Date Estimate Started**

12/23/2020

Last L D Estimate **This data captured here & recorded to Data warehouse when Project is moved to CD control group**

1,028,885.95

Loaded L D Estimate

1,320,979.58

Date of Gen Bid Base Price **Enter/Update Date When Items are Priced**

12/23/2020

Figure 4 - The General Tab Field Information

Use the **[TAB]** key to move between fields and enter the project information on the General tab.

Some fields have **Reference Tables**. As you **[TAB]** to such a field, a drop-down arrow will appear. A selection **MUST** be made from the available choices in the table.

GENERAL TAB FIELD DESCRIPTIONS:

Project ID Required: The Project ID (formerly PCN) may consist of as many as 13 characters (14 characters are required for maintenance-funded (Maintenance Division) projects). Refer to **Appendix A** for Project ID instructions. (Once the project is completed and added to the database, this field becomes display-only and cannot be changed.) All letters must be capitalized.
Examples: 0000109813C01, 0000110328N01

Project Description Required: For all projects (other than bridge), enter the description of the type of work being performed on this project. The description from iPM is the best source. For Bridge projects, enter the description from the front sheet title block from the plan set.

City/Cnty: Select County or City in which the project is located from the drop-down menu which should match the State Project Number. Appendix C & D includes County & City codes and appropriate conversions when required.

Ex.: Project number is 0615-047-169. County/City Code is 047.

Pavement Type: Select the appropriate code from the drop-down menu.

Pavement Type Code	
Code	Description
ASPH	Asphalt Concrete
BITC	Bituminous Concrete
BITP	Bituminous Penetration
COMB	Combination Asphalt & Concrete
GRDE	Grade & Drained Earth
GRVL	Gravel or Stone
MIXB	Mixed Bituminous
OTHR	All Others
POCC	Portland Cement Concrete
PRIM	Primitive
UNIM	Unimproved

Project Status: Status of the project. Select the appropriate code from the drop-down menu.

Project Status Table	
Code	Description
CE	Conceptual Estimate
CON1	Construction (1st Submission)
CON2	Construction (2nd Submission)
FI	Field Inspection
LAS	Passes to LAS
PE	Preliminary Engineering
PFR	Preliminary Field Review
PH	Public Hearing
RWS	Right of Way Stage
SR1	Secondary Roads Project Initiative
SYP	Six Year Plan

Project Work Type: Select the appropriate code from the drop-down menu.
See Appendix E for a complete listing.


Project Item Totals: This field populates automatically.

UPC Num Required: Enter the UPC number of the project. **This field must have 8 digits, please add leading zeros to the UPC number to attain 8 digits in this field.** Note: this field must match in all Projects under a Prime.

Estimator: This field designates the individual performing the independent Evaluative Estimate and the Plan Review in the Construction Division. Leave this field blank.

Designer: This field designates the individual entering the estimate in AWP-Precon. Select your name from the drop-down menu. **Note:** All VDOT users should have their name in the list. If your name is not in the list please contact the AWP-Precon Administrator found in the Getting Help section. Consultants shall select their firm/company name in this list which matches their Control Group number.

Job Number (C#, B#, CREW): This field is derived from the last numbers of the State Project number and can be found in IPM Pool tab under the Federal Numbers. Select the appropriate code from the drop-down menu. Example below from iPM. Users will select the CXXX for roadway, utilities, traffic, etc disciplines. Bridge projects will use the BXXX in the list.



Job #	Federal #	Federal Funding Info
P101	STP-058-5(002)	FHWA(STP) funds @ 80%
R201	STP-058-5(007)	FHWA (STP) FUNDS @ 100%
C501	STP-087-5(029)	FHWA (STP) FUNDS @ 80%
B636	STP-087-5(029)	FHWA (STP) FUNDS @ 80%
B637	STP-087-5(029)	FHWA (STP) FUNDS @ 80%

Control Group Required: The control group is the security designation that dictates what project(s) users have access to. This field populates automatically with your control group when creating new projects. The data in this field may be changed in order to transfer a project to another person/control group.

IPM Interface button: Refer to section 2.6.1 for complete details. Please note this feature only functions within VDOT networks.

Project Validation button: This is a VDOT specific project validation that should be run in conjunction with the System Validation. The button is located at the bottom of the General tab within an open Project. This Validation must be run for every Precon Project.

Item Code Table Required: Select from the drop-down menu. This coincides with the current Road and Bridge Specifications manual.
16 = 2016 Blue spec book

Unit System Required: Defaults to E (English Project). Note: Metric is no longer used.

State Project No.: Enter the state project number complete with dashes, commas, etc. Types starting with R or P (For example R201 and P101) should not be used.

ROUTE #
CITY or COUNTY CODE
SECTION
TYPE

EXAMPLE: 0615-047-169,C501
0122-009-103,C501,B603
0666-009-793,M501,B665
GR5D-965-255,N501

Federal Project No: Enter the Federal Project Number, if applicable, in its entirety, complete with dashes, parentheses, etc. If the project is not federally-funded, enter NONE. **Ex.:** NH-5401(876)

Federal Oversight: Select the appropriate code from the drop-down menu.
FO = Federal Oversight
NFO = No Federal Oversight
N/A = State Project

Federal ID: Enter only the **numbers** from the Federal Project Number, with no punctuation, no alpha characters, and seven digits maximum.

If the project **does not have a Federal Project Number** enter “NONE”

EXAMPLE: Fed. Project No. is STP-5A03(264)
Enter, **503264**

FHWA 534 Required: Enter the five alpha-numeric character code, found in the Project Pool of iPM.

Controlling Project Checkbox: Should be checked for the project containing the most money. See Chapter 8 of this manual for details.

Primary Project District ID: This field populates automatically.

Urban/Rural Class: Select the appropriate code from the drop-down menu: U, R or S.

Project Type: Select the appropriate code from the drop-down menu.

PROJECT TYPE CODE	
CODE	USE
CM	Construction / Maintenance Hybrid
CMMR	Maintenance RAAP
CMMS	Maintenance SAAP
CMSR	Maintenance Schedule RAAP
CR	Construction RAAP
CS	Construction SAAP
EM	Emergency

RAAP (Regular Advertisement and Award Process) are advertised on the 2nd Tuesday for a minimum of 21 days. Most actually exceed 35 days. They are mailed to our prequalified contractors and posted on VDOT’s Contractors Advertisement Bulletin Board (CABB) web system and the eVa website.

SAAP (Special Advertisement and Award Process) are advertised for 10 days minimum. Most actually exceed 25 days. They are mailed to our prequalified contractors and posted on VDOT’s Contractors Advertisement Bulletin Board (CABB) web system and the eVa website.

Progress Schedule Category Required: Select the appropriate Progress Schedule from the drop-down menu.

For description of codes or references, See **Appendix H** or found here:

<http://www.virginiadot.org/business/resources/const/projectcategories.pdf>

Date of Estimate Required: When you first create (add) the Project, this field will be automatically populated with the **current date**. This field indicates the date the estimate was first started.

Last L&D Estimate: This field populates automatically when a project is moved to the CD control group.

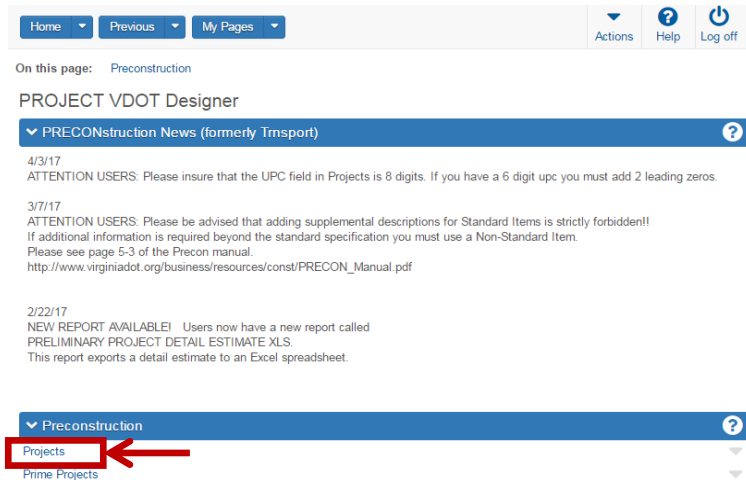
Loaded L&D Estimate: This field populates automatically when a project is moved to the CD control group.

Date of Gen Bid Base Prices: This is a date field. Users should change the date in this field when the prices have been changed or generated from the database.

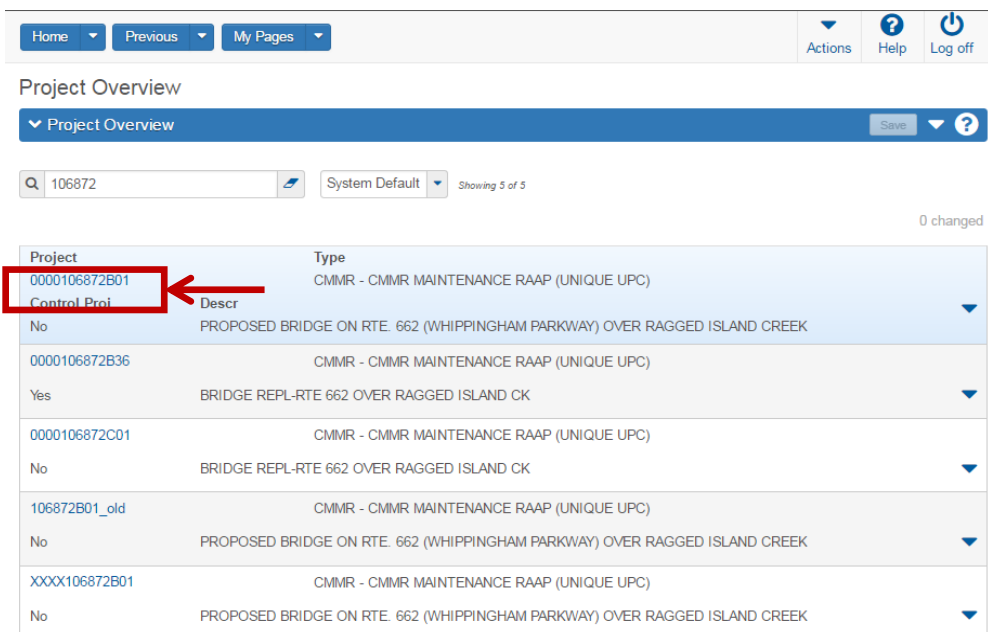
2.6.1 iPM Interface

Preconstruction has an interface that will pull the general project data from iPM and transfer the data into the fields of Preconstruction. The project in iPM is associated by the UPC field so it is crucial that the UPC field be filled out correctly. In order for this interface to work, the user must reside on the VDOT network. Unfortunately, this feature does not work for external users/Consultants.

The IPM Interface must be used from within an existing Project. From the Home Screen select **Projects**.



Type your Project ID into the Search box on the Project Overview Screen. Click on the Project ID once you have found your project



You are now in the Project on the General Tab. Scroll to the bottom of the page and select the button **IPM Interface**.

Project Summary

Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RA...

Proposal:

General

Project ID: 0000106872B01

Item Code Table: 07 - 2007

Project Description: PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK

Unit System: English

City/Cnty: 046 - 046 ISLE OF WIGHT

State Project Number: 0662-046-664, B636

Primary Project County ID: C046 - ISLE OF WIGHT

Federal Project Number: STP-BR05(258)

Pavement Type: ASPH - ASPHALT CONCRETE

Federal Oversight: N/A - STATE FUNDING

Project Status: PE - PRELIMINARY ENGINEERING

Federal ID: NONE

Project Work Type: BN - BRIDGE NEW

FHWA 534: 16015

UPC Number: 00106872

Controlling Project:

Estimator: C012 - ANDY KEETON (CO)

Primary Project District ID: 0533 - HAMPTON ROADS / SUFFOLK

Designer:

Urban/Rural: U - URBAN

Job Number (C#,B#,CREW): B601 - B601 BRIDGE PROJECT

Project Type: CMMR - CMMR MAINTENANCE RAAP (UNIQUE ...)

Control Group: CS47

Progress Schedule Category: 2 - 2 - PROGRESS SCHEDULE CATEGORY

Date of Estimate: 03/09/2016

Last L D Estimate

IPM Interface

The iPM interface will open a new window on your web browser. This page will show the current data you have on your project in Precon. Verify that the UPC Code is correct before moving forward.

AASHTOWare Project

Project Pool - Interface Application

User ID: GREGORY.PARSONS

User Name: GREGORY PARSONS

Project Number	0000094932C02
Item Code Table	07
UPC Code	94932
Project Description	IPM INTERFACE
Federal Project Number	
State Project Number	
FHWA 534	12345
Job Number	
Federal Oversight	
City/Cnty	
Urban/Rural	
Unit System	ENGLISH
Progress Schedule Category	1-PROGRESS SCHEDULE CATEGORY

Import IPM Data

Import JOB Data

NO RECORDS AVAILABLE

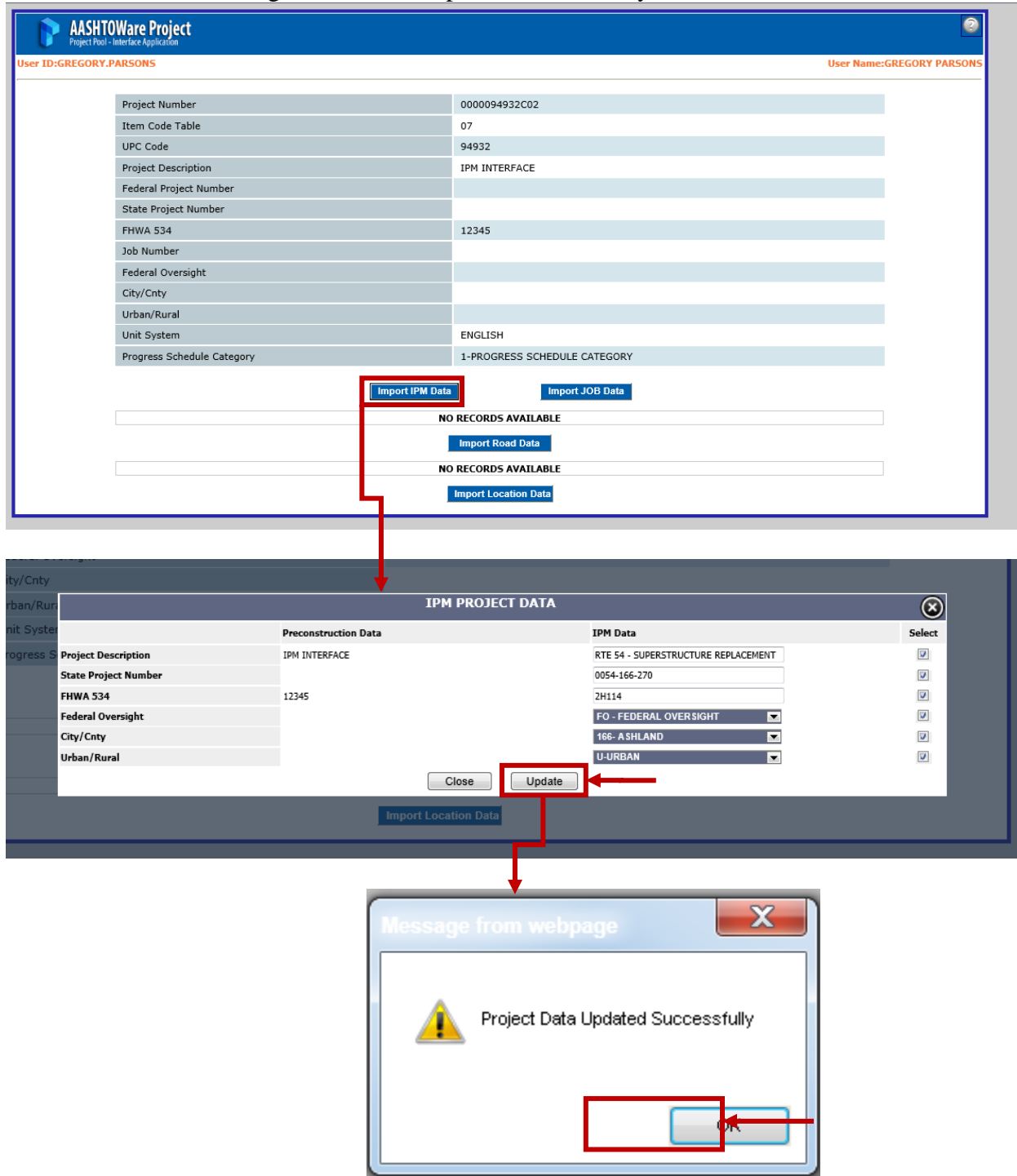
Import Road Data

NO RECORDS AVAILABLE

Import Location Data

Select the **Import IPM Data** button. A new window will appear. The column on the left displays the current data you have in Precon and the column on the right displays the data in IPM.

The Select checkbox beside each row allows you to choose which fields you want to overwrite with iPM Data. Click the **Update** button to import the iPM data or the **Close** button to cancel importing those fields to Precon. You will receive a message that the data updated successfully. Click **OK** to return to the iPM main screen.



Next, select the **Import Job Data** button. A new window will appear with the IPM Job Data. Depending on the UPC, there may be multiple selections associated to the project. The Select checkbox allows the user to select which job they would like to import. Click the **Update** button to import the iPM data or the **Close** button to cancel importing those fields to Precon. You will receive a message that the data updated successfully. Click **OK** to return to the iPM main screen.

AASHTOWare Project
Project Pool - Interface Application

User ID: GREGORY.PARSONS User Name: GREGORY PARSONS


Project Number	0000094932C02
Item Code Table	07
UPC Code	94932
Project Description	IPM INTERFACE
Federal Project Number	
State Project Number	
FHWA 534	12345
Job Number	
Federal Oversight	
City/Cnty	
Urban/Rural	
Unit System	ENGLISH
Progress Schedule Category	1-PROGRESS SCHEDULE CATEGORY

IPM JOB DATA

Select	UPC	PHASE	Job Number	Federal Number	Federal ID
<input type="checkbox"/>	94932	CN	B602	STP-BR04(266)	BR04266
<input type="checkbox"/>	94932	CN	B601	STP-BR04(266)	BR04266
<input type="checkbox"/>	94932	CN	C501	STP-BR04(266)	BR04266

NO RECORDS AVAILABLE

Message from webpage

 Job Data Updated Successfully

Click the **Import Road Data** button. A new window will appear with the Road Segment Data. The left column displays the data currently in Precon and the right column displays the data currently in iPM. The Select checkbox beside each row allows you to choose which fields you want to overwrite with iPM Data. Add the route in the Road Description field. Click the **Update** button to import the iPM data or the **Close** button to cancel importing those fields to Precon. You will receive a message that the data updated successfully. Click **OK** to return to the IPM main screen.

AASHTOWare Project
Project Pool - Interface Application

User ID: GREGORY.PARSONS User Name: GREGORY PARSONS

Project Number	0000094932C02
Item Code Table	07
UPC Code	94932
Project Description	IPM INTERFACE
Federal Project Number	
State Project Number	
FHWA 534	12345
Job Number	
Federal Oversight	
City/Cnty	
Urban/Rural	
Unit System	ENGLISH
Progress Schedule Category	1-PROGRESS SCHEDULE CATEGORY


NO RECORDS AVAILABLE

NO RECORDS AVAILABLE

ROAD SEGMENT DATA

	PreConstruction Data	IPM Data	Select
Road Section Number		270	<input checked="" type="checkbox"/>
Route		0054	<input checked="" type="checkbox"/>
Road System		P-PRIMARY	<input checked="" type="checkbox"/>
Road Description			<input checked="" type="checkbox"/>

Message from webpage

 Updated Road Data Successfully

After updating the Precon information with iPM Data, close the iPM interface web browser window.

http://ipmpluginap/WebtrnsIPM/Default.aspx?projguid=7709c5b0-376f-430e-b4ac-8063531148f Project Summary | Trnsport AASHTOWare Project-Project

File Edit View Favorites Tools Help

AASHTOWare Project
Project Pool - Interface Application

User ID:GREGORY.PARSONS User Name:GREGORY PARSONS

Project Number	0000094932C02
Item Code Table	07
UPC Code	94932
Project Description	RTE 54 - SUPERSTRUCTURE REPLACEMENT
Federal Project Number	STP-BR04(266)
State Project Number	(FO)0054-166-270,B602
FHWA 534	2H114
Job Number	B602
Federal Oversight	FEDERAL OVERSIGHT
City/Cnty	ASHLAND
Urban/Rural	URBAN
Unit System	ENGLISH
Progress Schedule Category	1-PROGRESS SCHEDULE CATEGORY

[Import IPM Data](#) [Import JOB Data](#)

Num	Road System	Route	Description
270	PRIMARY	0054	TEST

[Import Road Data](#)

NO RECORDS AVAILABLE

[Import Location Data](#)

Notice that the Precon data is not showing the new iPM Data. This is because the database has been updated since your last page refresh. Select the **F5** key to refresh your page or you may have to log out of Precon, then log back in for the update to appear.

Home Recent My Pages

Overview Categories and Items Fund Package Overview Funding: Assign to Items Item Alternate Summary Item Pricing Wage Decisions

Project Summary

Project: 0000094932C02 - RTE 54 - SUPERSTRUCTURE REPLACEMENT

Proposal:

General

Counties

Districts

Points

Road Segments

Bridge Segments

Workflow

Project ID:
0000094932C02

Project Description:
RTE 54 - SUPERSTRUCTURE REPLACEMENT

City/Cnty:
166 - 166 ASHLAND

Primary Project County ID:
-

Pavement Type:

Project Status:
PE - PRELIMINARY ENGINEERING

Item Code Table:
07 - 2007

Unit System:
English

State Project Number:
(FO)0054-166-270,B602

Federal Project Number:
STP-BR04(266)

Federal Oversight:
FO - FEDERAL OVERSIGHT

Federal ID:
BR04266

2.7 Counties Tab

Each project must have at least one county associated to it and its Percentage must equal 100%. Failure to associate a county will prevent the generation of the preliminary detail estimate report. The Primary County selected should match the county that is used in IPM.

When adding a County at the Project summary screen, click the New button, a blank row will open to enter the county information.

Project Summary

Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY)...

Proposal:

General

Counties

Districts

Points

Road Segments

Bridge Segments

Workflow

New

0 added | 0 marked for deletion | 0 changed

County ID	Percentage	Primary
C046 ISLE OF WICK	60.0000	<input checked="" type="checkbox"/>
C090 SURREY	40.0000	<input type="checkbox"/>

App. C

Select County from pull-down

All together Must equal 100.00

Check the Primary County, used in IPM

Click the Save button when finished

To add a County:

1. When the **Counties tab** is displayed, if it is not showing a blank row, click the **New button** and enter the following information:
2. **County ID:** this is a search field. Enter the **county number or name** and then select the appropriate code from the drop-down menu. See **Appendix C** for a complete listing.
3. **Percentage:** this is a **required field** and will **default to 100**.
 - This is the percentage of the Project that is associated with this County.
4. **Primary: Checkbox** – This should always be checked for the larger percentage county.
 - **One county must be flagged as the Primary County**, which is the **controlling county**. This primary county should match the county shown in iPM.
5. When the county information has been entered, click the **Save button**.

2.7.1 Deleting a County from a Project

To **remove** a **County** from a Project, select the Counties tab and select the County row's Action Menu and select **Delete**. After the row turns grey, click on **Save** to complete the delete.

To **change** a **County** to a **different County**, go to the Counties tab and select the County ID field and change to the new **County ID**, and then select **Save**.

2.8 District Tab

Each project must have at least one District and its associated Residency assigned to the project, which can be found in iPM.

When adding a District at the Project summary screen, click the **New** button, a blank row will open to enter the district information.

Project Summary

Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY)...

Proposal:

General

Counties

Districts

Points

Road Segments

Bridge Segments

Workflow

New

Search: Type search criteria or press Enter

Advanced Showing 1 of 1

0 added | 0 marked for deletion | 0 changed

District ID: 0533

Primary: ☒

HAMPTON ROADS / SUFFOLK

Enter the District # or type the name in this search field. Be sure to include the Residency

Should always be checked

Click the Save button when finished

To add a District:

1. When the District tab displays, if it is not showing a blank row, click the **New** button and enter the following information:
2. **District ID:** This is a search field. Hit the **Enter** key or enter all or part of the District number or name and select the appropriate **District** from the drop-down list. See Appendix D for a complete list.

<u>District</u>	<u>District No.</u>
Bristol	1
Salem	2
Lynchburg	3
Richmond	4
Hampton Roads	5
Fredericksburg	6
Culpeper	7
Staunton	8
Northern VA	9

3. **Primary: Checkbox: Should always be checked.** This checkbox indicates that the District is the **first or principal** district in which work will be performed for this project.
 - If there are **multiple** Districts, then **one** District must be flagged as the **Primary** District and contains the majority of the work.

2.9 Points Tab

The Points tab provides vital project data for the From & To description and the Longitude & Latitude of the project.

When adding a Points (location) at the Project summary screen, click the **New** button, a blank row will open to enter the point information.

The screenshot shows the 'Project Summary' screen for 'Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY)...'. A red box highlights the 'New' button in the 'Points' section. Another red box highlights the 'Save' button at the top right. A red box highlights the 'Type' dropdown menu, which is set to 'Midpoint' and labeled 'Always Midpoint'. A red box highlights the 'Latitude' field with the value '36:57:09.00'. A red box highlights the 'Longitude' field with the value '76:31:04.00'. A red box highlights the 'Location' field with the text 'FROM: 0.53 MI. SOUTH OF ROUTE 17 TC' and 'TO: 1.58 MI. NORTH OF ROUTE 663'. A red box highlights the 'Category ID' field, which is empty and labeled 'Leave blank'. A red box highlights the 'Enter the From and To descriptions from IPM' text. A red box highlights the 'Enter the Long/Lat, in the middle of the project, be sure it is on the road or pavement.' text. A red box highlights the 'Click the Save button when finished' text.

Project Summary

▼ Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY)...

Proposal:

General

Counties

Districts

Points

Road Segments

Bridge Segments

Workflow

Type ▼ **Always Midpoint**

Midpoint

Latitude ▼ 36:57:09.00

Longitude ▼ 76:31:04.00

Location ▼ FROM: 0.53 MI. SOUTH OF ROUTE 17 TC TO: 1.58 MI. NORTH OF ROUTE 663

Category ID ▼

Enter the **From** and **To** descriptions from IPM

Enter the Long/Lat, in the middle of the project, be sure it is on the road or pavement.

Leave blank

Click the **Save** button when finished

To add Points (location) information:

1. Click the **New** button and enter the following information:
2. **Type field Required:** This field will default to **Midpoint** and can only be **Midpoint**.
3. **Latitude field Required:** Enter the Latitude using this format **36:36:43.00**.
4. **Longitude field Required:** Enter the Longitude using this format 80:23:27.00. The negative should NOT be entered.
5. **Location field Required:** Enter the **FROM: description** and **To: description** from iPM.
6. **Category ID field:** Not used, leave blank.
7. **Location:** Not used, leave blank.

Note about Long/Lat: If a project spans a large area, provide the Long/Lat at the center of the work area. The Long/Lat fields are used by the Civil Rights Division to determine DBE goals using a 75 mile radius from the point provided.

2.10 Road Segments tab

A road segment is a portion of a road that can be described by a set of starting and ending stationing. A Road Segment should be created for each road on the project. A road segment can be used to locate a specific section of a road as the site for a project's work or a portion of the project's work. **All Precon projects (including Bridge projects) must have at least 1 Road Segment.**

When adding a Road Segment at the Project summary screen, click the **New** button, a blank row will open to enter the road segment information.

Project Summary

The screenshot displays the 'Project Summary' screen for 'Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKW...)'. The 'Road Segments' tab is selected in the left sidebar. The main form area shows a table with one row for 'WHIPPINGHAM PARKWAY' (S - SECONDARY 664). Red boxes and arrows highlight the following fields and actions:

- Save button:** Located at the top right of the form, with the instruction 'Click the Save button when finished'.
- New button:** Located below the 'State Project Number' field, with an arrow pointing to it from the text 'When adding a Road Segment... click the New button'.
- Name:** A text field containing 'WHIPPINGHAM PARKWAY'.
- Road Section Number:** A dropdown menu set to '664'.
- Description:** A dropdown menu set to 'Primary', with the instruction 'Enter Primary'.
- Lane Mile, Length, Width, Applied Depth:** A group of four empty input fields, collectively labeled 'Optional'.
- Road System:** A dropdown menu set to 'S - SECONDARY', with the instruction 'IPM'.
- Route:** A text field containing '0662'.
- Begin Station, End Station:** Two text fields containing '101+65.08' and '103+17.94' respectively, collectively labeled 'Optional'.
- Category ID:** A dropdown menu, with the instruction 'leave blank'.

The fields on the Road Segment tab are:

- 1) **Name:** The name of the Road Segment.
- 2) **Road Section No.:** Enter the **section number of the Project Number** (the third part of the State Project Number).
Ex.: Project number is 0615-047-169. Section number is 169.
- 3) **Description Required:** Enter the word **Primary** in this field.
- 4) **Lane Mile:** A unit of measure **one standard lane wide and one mile long**. **Note: The Lane miles should not be separated between Road Segments, the project total Lane Miles should be entered in the *first* road segment of a project if there is more than 1 Road Segment.**
- 5) **Length:** The **length** of the Road Segment in **miles**, to 4 decimal places.
- 6) **Width:** The **width** of the Road Segment in **feet**, to 4 decimal places.
- 7) **Applied Depth:** The **depth of the pavement** in the Road Segment in **inches** (or in centimeters for metric projects). This field is optional.
- 8) **Road System Required:** The **functional class of the road** (obtained from the title sheet of the plan set or iPM). Select the appropriate code from the drop-down menu.
- 9) **Route Required:** Enter the **Route Number** exactly as it appears in the State Project Number, it **must be 4 digits**:
Ex. #1: Project number is 0064-122-101, C501. Route number is 0064.
Ex. #2: Project number is U000-124-110, B610. Route number is U000.
Ex. #3: Project number is 0615-047-169, C501. Route number is 0615.
- 10) **Beginning Station:** Enter the **beginning station of the project** (from iPM or the plan set cover sheet) and the “+” and decimals should be included, otherwise this field can be left blank. (**Ex.:** 1290+10.72) This field is optional.
- 11) **Ending Station:** Enter the **ending station of the project** (from iPM or the plan set cover sheet) and the “+” and decimals should be included, otherwise this field can be left blank. (**Ex.:** 1360+15.95.) This field is optional.
- 12) **Category ID:** A unique identifier assigned to each Project Category in the system. **This field is not used, leave blank.**
- 13) **Location:** Not used, leave blank.

2.11 Bridge Segments tab

A bridge segment can be used to locate a specific section of a bridge as the site for a project's work or a portion of the project's work. It can also refer to an entire bridge. Not all Precon projects require a Bridge segment but all Bridge projects must include at least one Road Segment.

When adding a Bridge Segment at the Project summary screen, click the New button, a blank row will open to enter the bridge information.

Project Summary

▼ Project: 0000106872B36 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Proposal: C0000106872B36

General
Counties
Districts
Points
Road Segments
Bridge Segments
Workflow

Q Type search criteria or press Enter Advanced Showing 1 of 1

New

297-43 - RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK 021 - PRESTRESSED SLAB

Bridge Plan Number ▼
297-43

Description ▼
RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK

Bridge Type ▼
021 - PRESTRESSED SLAB

Length ▼
0.0100

Width ▼
33.0000

Number of Spans ▼
1

Start Latitude ▼
Start Longitude ▼
End Latitude ▼
End Longitude ▼

Optional

Category ID ▼
leave blank

Save

Click the Save button when finished

Figure 2 - The Bridge

The fields on the Bridge Segment tab are:

1. **Bridge Plan Number Required:** Enter the number in this field. Ex: 276-73
2. **Description Required:** Enter the **description**.
3. **Bridge Type Required:** Select the appropriate type from the pull-down.

Bridge Type	
Code	Description
001	PRESTRESSED CONCRETE BEAM
002	CONCRETE BOX GIRDER
003	RIGID FRAME
004	BOX CULVERT
005	STEEL BOX GIRDER
006	ROLLED BEAM
007	STEEL PLATE GIRDER
008	TRUSS
009	CONCRETE SLAB SPAN
010	CHANNEL BEAM
011	ARCH
012	SWING SPAN
013	BASCULE SPAN
014	COMBINATION PLATE GIRDER & ROLLED BEAM
016	LIFT SPAN
017	RETRACTILE SPAN
018	OTHER
019	PEDESTRIAN OR BIKEWAY BRIDGE
020	PRESTRESSED BOX BEAM
021	PRESTRESSED SLAB
022	PRESTRESSED CONCRETE BEAM, BULB-T

4. **Length Required:** Enter the length in **miles**, to 4 decimal places.
5. **Width Required:** Enter the width in **feet**, to 4 decimal places.
6. **Number of Spans Required:** Enter the number of spans as a whole number.
7. **Category ID:** A unique identifier assigned to each Project Category in the system. **This field is not used.**
8. **Location:** Not used, leave blank.

2.12 Project Workflow

The Workflow tab is a crucial step in moving an estimate through the phases of the software to produce the Contract document. Users must make the proper selection for all Projects and the Prime according to the table below. Leaving the workflow fields blank results in reporting errors.

Project Summary

▼ Project: 000000010755! - Belmont Crossing

Save ▼ ?

Proposal:

General
Counties
Districts
Points
Road Segments
Bridge Segments
Workflow

Workflow
VDOT PROJECT-PROPOSAL-CONTRACT ▼
WorkflowPhase
PROJECT DEFINITION PHASE ▼

Prime Project Summary

▼ Prime Project: 0000107151B10 - FROM: Bridge over I-95 @ Exit 52 TO: Bridge over I-95 ...

Save ▼ ?

General
Projects
Workflow

Workflow
VDOT PROJECT-PROPOSAL-CONTRACT ▼
WorkflowPhase
PROJECT DEFINITION PHASE ▼

Workflow Phase Definitions				ADMIN Role Only
	WORKFLOW NAME	DESCRIPTION	NOTES	
1	Project Definition Phase		Engineers/Designers Use	
2	Proposal Definition Phase		Construction Division/District SAPP Coordinators	
3A	Advertisement Phase	Locks Proposal/No changes from Projects	Any changes once the Proposal is Advertised must be added in the Addenda phase with proper notification to Document assembly group	
3B	Addenda Phase	Changes only reflected when Addenda is open	Changes made during Advertisement.	
4	Bid Letting Phase		Construction Division Use Only	
5	Post Bid Evaluation Phase		Construction Division Use Only	
6	Preconstruction has ended Phase		Construction Division Use Only	
7	Moved to Construction/SiteManager	Passed to CLR/SiteManager	Construction Division Use Only	
8	Historical Phase		Construction Division Use Only	

2.13 Retrieving a Project

To open an existing project:

1. Click on **Projects** from the Preconstruction Dashboard located on the Home page.
 - This will take you to the **Project Overview** screen.
2. Clear out the Search by **clicking on the eraser**, then **enter the Project ID** (upc number).
3. The **Project Summary** row will display all projects with that upc that are available in your control group.
4. Click the **Project ID** to open it.

Enter the **UPC number** in the search box, search automatically begins after the 3rd digit is typed.

Project Overview

▼ Project Overview

Save



Q 105110

System Default

Showing 0 of 8

0 changed

Project	Type
0000105110C01	CR - CR CONSTRUCTION RAAP
Control Proj	Descr
Yes	RTE 106 - IMPROVE INTERSECTION
0000105110C02	CR - CR CONSTRUCTION RAAP
Yes	RE 106 - IMPROVE INTERSECTION

Click the Project ID to open.

2.14 Delete a Project

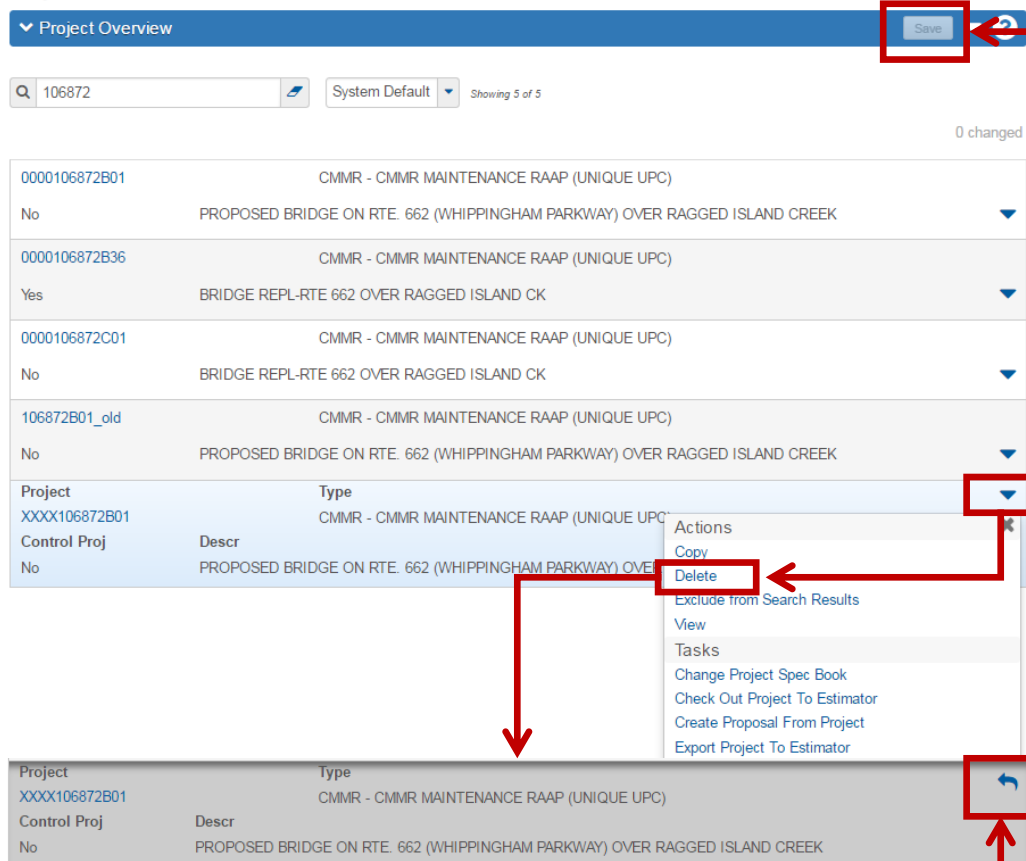
Note: Prior to deleting a project, **YOU MUST** disassociate the project from the Prime and the Proposal if attached. *See Prime and Proposal chapters for details.*

To delete a project

1. Enter the UPC in the search field.
2. Select the row action button for the project you wish to delete.
3. Select **Delete**.
4. The row will turn **grey** and can be **reversed** by clicking the **Undo** button.
5. Click the **Save** button to delete the Project.



Project Overview



▼ Project Overview

Q 106872 System Default Showing 5 of 5 0 changed

0000106872B01	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)	No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK	▼
0000106872B36	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)	Yes	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK	▼
0000106872C01	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)	No	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK	▼
106872B01_old	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)	No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK	▼
Project	Type			▼
XXXX106872B01	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)			▼
Control Proj	Descr			▼
No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK			▼

Actions

- Copy
- Delete
- Exclude from Search Results
- View
- Tasks
- Change Project Spec Book
- Check Out Project To Estimator
- Create Proposal From Project
- Export Project To Estimator

Use this button to **reverse the Delete** before the Save button is clicked

To **confirm the delete** click the Save button

2.15 Copying a Project

To copy a project from the Project Overview screen:

1. Click the row action button of the project you wish to copy, select **Copy**.
2. When you **click on Copy**, it will bring up the **Copy Project** screen displaying the old Project to be copied.
3. Enter a **new and unique Project ID**.
4. Click the **Copy button** on the Copy Project header to complete the copy.
5. The Project will **copy without errors or warnings**. When completed, the Copy will return the user to the copied Project's **Project Summary General** tab which displays the new Project ID.

The screenshot shows the 'Project Overview' screen. At the top, there is a search bar with '106872' and a dropdown menu set to 'System Default'. Below this is a table of projects. The first row is highlighted in blue. A red arrow points to the 'Actions' column of this row, specifically to the 'Copy' button. Another red arrow points from the 'Copy' button to the 'Copy Project' dialog box that appears below. In the dialog box, a red box highlights the 'New Project ID' field, which contains '0000106872B02'. Another red box highlights the 'Copy' button in the dialog's header. The dialog box also displays project details such as 'Project Description', 'Federal Project Number', 'State Project Number', 'Item Code Table', 'Unit System', 'Project Type', and 'Urban/Rural'.

Click the row action button of the project you wish to copy, Select **Copy**

A new window opens. Enter a new unique **Project ID** and click the **Copy** button

Copy Project

New Project ID*

0000106872B02

Project Description
PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK

Federal Project Number
STP-BR05(258)

State Project Number
0662-046-664, B636

Item Code Table
07 - 2007

Unit System
English

Project Type
CMMR - MAINTENANCE RAAP

Urban/Rural
U - URBAN

2.15.1 Copy a Project (Alternate Method)

As an alternative, the copy can be performed from within a **Project** from the General Tab.

- Click the blue component bar action button and select **Copy**.
- Enter a new **Unique Project ID** and then click the **Copy** button.

Project Summary

▼ Project: 0000106872B36 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save ?

Proposal: C0000106872B36

General Project ID 0000106872B36

Project Description * BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

City/Cnty 046 - 046 ISLE OF WIGHT

Primary Project County ID C046 - ISLE OF WIGHT

Actions

- Add New
- Copy**
- Tasks
 - Change Project Spec Book
 - Check Out Project To Estimator
 - Create Proposal
 - Export Project To Estimator
 - Lock Project
 - Validate Project
- Views
- Attachments

A new window opens. Enter a new **unique Project ID** and click the **Copy** button

Copy Project

▼ Copy Project: 0000106872B01 Copy ?

New Project ID * 0000106872B02

Project Description PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGC

Federal Project Number STP-BR05(258)

State Project Number 0662-046-664, B636

Item Code Table 07 - 2007

Unit System English

Project Type CMMR - MAINTENANCE RAAP

Urban/Rural U - URBAN

3. MAINTENANCE-FUNDED PROJECTS

For simplicity in this chapter, this type of project will be referred to as a maintenance-funded project.

This chapter covers adding, changing and deleting maintenance-funded projects. A special chapter is required for this since much information input for maintenance-funded projects differs from construction projects.

There are **two basic types of maintenance-funded projects**:

- **Schedule Work** (at multiple locations with like assets)
- **Maintenance-funded Project at a single location** (i.e., Bridge Repair)

3.1 Schedule Work (at multiple locations with like assets)

An example of schedule work is Plant Mix or Bridge Joint Repairs being done in 8 different counties, and involving all three types of road systems (interstate, primary, secondary).

In Preconstruction, this work needs to be broken down into separate projects BY COUNTY, BY SYSTEM. For the above-mentioned example, 24 projects would need to be created.

TIP: If the projects will be basically the same (same funding, same pay items, etc.), take advantage of the Copying a Project option. Prepare one project in its entirety, composing the category, attaching the funding and the items, and THEN copy the project. Once the project is copied, minor modifications may be made to the copy(ies). See **2.14 Copying a Project** for instructions to copy a project.

3.2 Maintenance-funded Project at a single location (i.e. Bridge Repair)

Entry for Maintenance-funded projects at a single location is entered the same as Construction projects with the exception of the Project ID (see Appendix A). Refer to Section 2 – Projects of this manual.

*All users should use **all UPPER CASE** for **ALL fields** in Preconstruction*

3.3 Creating a New Project

The Add Project function creates a new Project and opens on the **General** tab, which allows you to add basic information for the new project.

- Click on **Projects** from the Preconstruction Dashboard located on the Home page.
- **Click the Project Overview Action button and click Add.**
- Fill in **only the required fields on the General tab.**
- Please see **Appendix A** for proper naming conventions.

From the Preconstruction Dashboard, click on **Projects**. This will take you to the **Project Overview** screen.

Project Overview

Actions
Add
Tasks
Check In
Import

Click the component bar action button and select **Add**.

The Add Project screen opens on the General tab.

Add Project

General
Counties
Districts
Points

Project ID *
0000106872B37 **Appendix A**

Project Description *
BRIDGE REPLACEMENT-RT 662 OVER RAGGED ISLAND CREEK

Federal Project Number
STP-BR05(258)

State Project Number
(NFO)0662-046-664,B636

Progress Schedule Category *
2 - 2 - PROGRESS SCHEDULE CATEGORY

Control Group *
CS1

IPM Interface

Item Code Table *
16 - 2016

Unit System *
English

Project Type
CR - CR CONSTRUCTION RAAP

Urban/Rural
U - URBAN

FHWA 534 *
26011

UPC Number *
00106872

Date of Estimate *
05/08/2017

Click Save When finished

Figure 3 - Adding a Project from the Project Overview screen

The Add project screen requires entry of only the minimum required fields for the database to determine if the Project ID is unique, once the new project is saved then the user will complete the remaining fields.

Please use all UPPER CASE for ALL fields in Precon.

The following fields are required (indicated by a **red asterisk**) when adding a new Project:

10. Project ID (See Appendix A for complete rules and instructions)

11. Project Description

12. Progress Schedule Category (See Appendix H)

13. Control Group

14. Item Code Table


15. Unit System

16. FHWA 534

17. UPC Number (must be 8 digits)


18. Date of Estimate

The **Add Project** screen will display four tabs: General, Counties, Districts and Points.

- The remaining Project Summary tabs – Road Segment, Bridge Segment and Workflow will not appear until you have saved the Add Project screen and go to the Project Overview screen and retrieve the newly added Project.
- To save the newly added project, click the **Save**  **button** found on the right side of the Add Project header.

Saving the Project and Correcting Errors

When all tabs of the Add Project screen have been completed or when you are ready to save your data, click the

Save  **button** to insure that all information entered has been saved.

- If you have completed all required field criteria satisfactorily and the Project ID (PCN) is a unique number, the project will be added/saved.
- The Project ID field can be changed as long as you are on the Add Project screen, even if the project was previously saved on that screen.
- Once you navigate away from the Add project screen, then you can only return to that project by way of the Project Summary screen. **The Project ID field will convert to display-only and cannot be changed.** This ensures unique Project ID's in the database.
- If a required field was not filled-in or incorrect data entered at a field which is supported with a reference table, an **Error** box will display. For example, if you left a required field blank or entered invalid data, you will see an **Error** box at the top giving information as to what field was left blank or contains an invalid value.
- If you attempted to create a project with a Project ID already in existence in the Precon database, you will see an **Error** box with the message that the Project ID (the primary key) is already being used by another project. A project could already exist in another control group with the Project ID you have just attempted to create. Precon will not allow duplicate Project IDs.

Note: when any errors are presented, they may **only show up one at a time**, so you may have to go through **several corrections** before a save is successful.

Errors must be corrected before the new project record will be saved/created.

3.3.1 Retrieving a Project

Now that you have created & saved your Project and the required fields on the General tab, **click the Overview link**, enter the new project's UPC Number and complete the remaining tabs; **Counties, Districts, Points, Road Segment, Bridge Segment** and **Workflow** tabs.

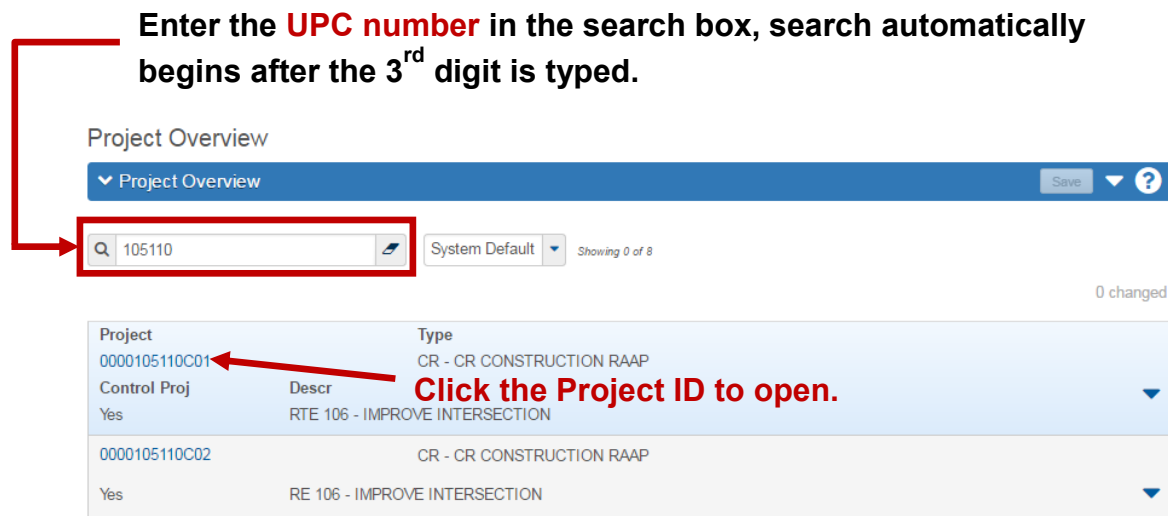


Figure 3 - Retrieving a Project from the Project Overview Screen

To complete the Project:

4. Click on the **Overview quick link** at the top left of the Add Project screen or click on the **Home button** and then click on **Projects** from the Preconstruction Dashboard located on the Home page.
 - This will take you to the **Project Overview screen**.
5. Clear out the Search by **clicking on the eraser**, and then **enter the UPC Number**.
6. The **Project Summary row** will open. Click on the **Project ID** to open your Project.

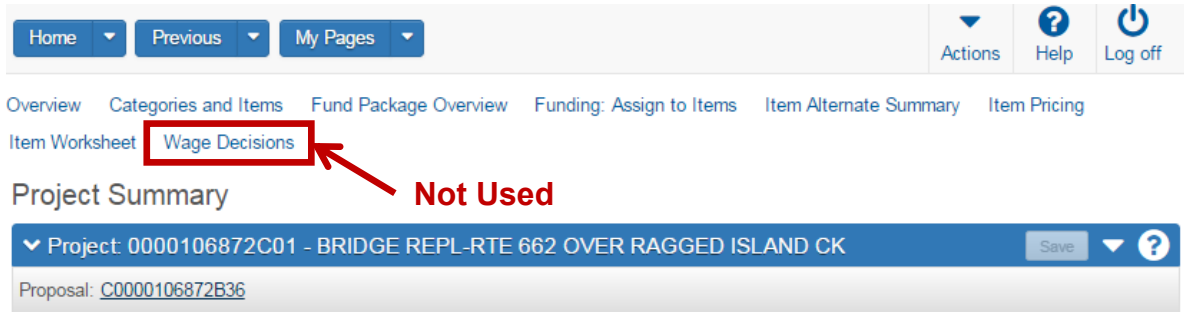
3.3.2 Project Quick links

Quick links are displayed in blue text below the Menu Bar and above the blue component bar. These links allow you to quickly jump to application pages for the project.

All but the Wage Decisions quick links are discussed in later chapters.

- Users do not need to enter Wage decisions information at the project level.

That information is added in the Proposal. See chapter 9 for details



3.3.2 General tab

Project: 0000110795C01 - SMARTSCALE - ADD LANE TO RTE 107 UNDER I-81 EXIT 35

Proposal: C0000110795C01

General	Project ID M121PMA117433	Item Code Table 16 - 2016
Courtles		Unit System English
Districts	Project Description 2021 PLANT MIX	State Project Number PM1A-961-F22 N501
Points	City/City 961 - 961 BRISTOL	Federal Project Number PM01(339)
Road Segments	Primary Project County ID CB10 - BLAND	Federal Oversight NFO - NO FEDERAL OVERSIGHT
Bridge Segments	Pavement Type ASPH - ASPHALT CONCRETE	Federal ID 01339
Workflow	Project Status CONT - CONSTRUCTION (1ST SUBMISSION)	FHWA 534 11105
	Project Work Type MAR - MAINT ASPHALT PLANT MIX RESURFACING	Controlling Project <input checked="" type="checkbox"/> For the Project Prime
	Project Item Total 2,530,892.19	Primary Project District ID 0102 - BRISTOL / DISTRICTWIDE OR OFFICE
	UPC Num 00117433	Urban/Rural R - RURAL
	Plan Reviewer / Estimator C024 - ZACH JONES	Project Type CMR - MAINTENANCE RAAP
	Designer 1047 CHASE BUCHANAN	Progress Schedule Category M - M - PROGRESS SCHEDULE CATEGORY
	Job Number (C&B) N501 - N501 NO PLAN PROJECT	Date of Estimate 12/23/2020
	Control Group CD	Last L/D Estimate 2,762,520.96
	IPM Interface	Loaded L/D Estimate 3,106,471.96
	Project Validation	Date of Gen Bid Base Price 12/23/2020

Annotations:

- App. A**: Project ID
- iPM**: Project Description
- iPM/App. C**: City/City
- Pg. 2-8**: Pavement Type
- Pg. 2-9**: Project Status
- App. E**: Project Work Type
- MUST be 8 Digits!!**: UPC Num
- Const. Division Staff**: Plan Reviewer / Estimator
- VDOT user or Company Name**: Designer
- From State Project #**: Job Number (C&B)
- Enter your unique Control Group #**: Control Group
- Last Step When Project is complete**: Project Validation
- Current Spec Book**: Item Code Table
- iPM**: State Project Number
- iPM**: Federal Project Number
- iPM**: Federal Oversight
- Numerals from Federal Project Number**: Federal ID
- iPM**: FHWA 534
- For the Project Prime**: Controlling Project
- iPM**: Urban/Rural
- Pg. 2-11**: Project Type
- App. H**: Progress Schedule Category
- Date**: Date of Estimate
- Estimate Started**: Date of Estimate
- This data captured here & recorded to Data warehouse when Project is moved to CD control group**: Last L/D Estimate
- Enter/Update Date When Items are Priced**: Date of Gen Bid Base Price

Use the **[TAB]** key to move between fields and enter the project information on the General tab.

Some fields have **Reference Tables**. As you [TAB] to such a field, a drop-down arrow will appear. A selection **MUST** be made from the available choices in the table.

General Tab FIELD DESCRIPTIONS:

Project ID (PCN) Required: required - The Project ID (PCN) consists of 14 characters. Refer to **Appendix A** for Project ID instructions. (Once the project is completed and added to the database, this field becomes display-only and cannot be changed.)
Examples: M514SSB104463, M217PMN110484

Project Description Required: For all projects (other than bridge), enter the description of the type of work being performed on this project. The description from iPM is the best source. For Bridge projects, enter the description from the front sheet title block from the plan set.

City/Cnty: Select County or City in which the project is located from the drop-down menu which should match the State Project Number. Appendix C & D includes County & City codes and appropriate conversions when required.

Ex.: Project number is 0615-047-169. County/City Code is 047.

Pavement Type: Select the appropriate code from the drop-down menu.

Pavement Type Code	
Code	Description
ASPH	Asphalt Concrete
BITC	Bituminous Concrete
BITP	Bituminous Penetration
COMB	Combination Asphalt & Concrete
GRDE	Grade & Drained Earth
GRVL	Gravel or Stone
MIXB	Mixed Bituminous
OTHR	All Others
POCC	Portland Cement Concrete
PRIM	Primitive
UNIM	Unimproved

Project Status: Status of the project. Select the appropriate code from the drop-down menu.

Project Status Table	
Code	Description
CE	Conceptual Estimate
CON1	Construction (1st Submission)
CON2	Construction (2nd Submission)
FI	Field Inspection
LAS	Passes to LAS
PE	Preliminary Engineering
PFR	Preliminary Field Review
PH	Public Hearing
RWS	Right of Way Stage
SR1	Secondary Roads Project Initiative
SYP	Six Year Plan

Project Work Type: Select the appropriate code from the drop-down menu (Maintenance Surface Treatment, Maintenance Signals, Maintenance Asphalt Resurfacing, etc.). Maintenance work types are MAR, MSS, or MST. See Appendix E

Project Item Totals: This field populates automatically.

UPC Num Required: Enter the UPC number of the project. **This field must have 8 digits, please add leading zeros to the UPC number to attain 8 digits in this field.** Note: this field must match in all Projects under a Prime.

Estimator: This field designates the individual performing the independent Evaluative Estimate. Select the appropriate code from the drop-down menu.

Designer: This field designates the individual entering the estimate in AWP-Precon. Select your name from the drop-down menu. **Note:** All VDOT users should have their name in the list. If your name is not in the list please contact the AWP-Precon Administrator found in the Getting Help section. Consultants shall select their firm/company name in this list which matches their Control Group number.

Job Number: This field is derived from the last numbers of the State Project number and can be found in IPM Pool tab under the Federal Numbers. Select the appropriate code from the drop-down menu. The most typical are P401 or N501
 EG: PM88-968-F17,N501
 (NFO) PM4A-042-F17, P401

Federal Numbers		
Job #	Federal #	Federal Funding Info
N501	NHPP-PM09(351)	FHWA (NHPP) AC FUNDS AT 100%

Control Group Required: The control group is the security designation that dictates what project(s) users have access to. This field populates automatically with your control group when creating new projects. The data in this field may be changed in order to transfer a project to another person/control group.

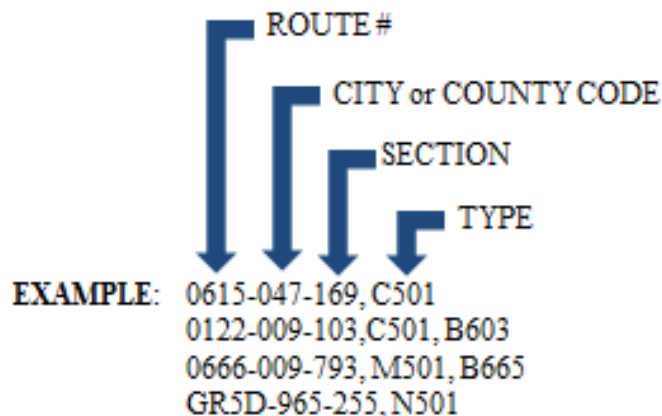
IPM Interface button: Refer to section 2.5.1 for complete details. Please note this feature only functions within VDOT networks.

Project Validation button: This is a VDOT specific project validation that should be run in conjunction with the System Validation. The button is located at the bottom of the General tab within an open Project. This Validation must be run for every Precon Project.

Item Code Table Required: Select from the drop-down menu. This coincides with the current green Road and Bridge Specifications manual.
 16 = 2016 Blue spec book or 07 = 2007 Green spec book

Unit System Required: Defaults to E (English Project). Note: Metric is no longer used.

State Project No.: Enter the state project number in its entirety, complete with dashes, commas, etc. **with the (FO) or (NFO) or State funded projects get no designation at the beginning.**



Federal Project No.: Enter the Federal Project Number, if applicable, in its entirety, complete with dashes, parentheses, etc. If the project is not federally-funded, enter NONE. **Ex.:** NH-5401(876)

Federal Oversight: Select the appropriate code from the drop-down menu. **Reminder: The (NFO) or (FO) designation should be added at the beginning of the State project # field with parenthesis.** FO = Federal Oversight

NFO = No Federal Oversight

N/A = State Project

Federal ID: Enter only the **numbers** from the Federal Project Number, with no punctuation, no alpha characters, and seven digits maximum.

If the project **does not have a Federal Project Number** enter “NONE”

EXAMPLE: Fed. Project No. is STP-5A03(264)

Enter, **503264**

FHWA 534 Required: Enter the five alpha-numeric character code, found in the Project Pool of iPM.

Controlling Project Checkbox: Should be checked for the project containing the most money. See Chapter 8 of this manual for details.

Primary Project District ID: This field populates automatically.

Urban/Rural Class: Select the appropriate code from the drop-down menu: U, R or S.

Project Type: Select the appropriate code from the drop-down menu.

PROJECT TYPE CODE	
CODE	USE
CM	Construction / Maintenance Hybrid
CMMR	Maintenance RAAP
CMMS	Maintenance SAAP
CMSR	Maint Schedule RAAP
CR	Construction RAAP
CS	Construction SAAP
EM	Emergency

RAAP (Regular Advertisement and Award Process) are advertised on the 2nd Tuesday for a minimum of 21 days. Most actually exceed 35 days. They are mailed to our prequalified contractors and posted on VDOT’s Contractors Advertisement Bulletin Board (CABB) web system and the eVa website.

SAAP (Special Advertisement and Award Process) are advertised for 10 days minimum. Most actually exceed 25 days. They are mailed to our prequalified contractors and posted on VDOT’s Contractors Advertisement Bulletin Board (CABB) web system and the eVa website.

Progress Schedule Category Required: Select the appropriate Progress Schedule from the drop-down menu.

For description of codes or references, See **Appendix H** or open this link:

<http://www.virginiadot.org/business/resources/const/projectcategories.pdf>

Date of Estimate Required: When you first add the Project, this field will be automatically populated with the **current date**.

Last L&D Estimate: This field populates automatically.

Loaded L&D Estimate: This field populates automatically.

Date of Gen Bid Base Prices: This field **no longer populates automatically**, users should fill in this field every time they price Items and/or Category Items.

iPM Interface Button: Please see 2.5.1 of this manual for complete details.

Project Validation button: This is a VDOT specific project validation that should be run in conjunction with the Project validation from the blue component bar. It checks the following:

- a. Checks all Regular/Bid categories do not have items checked Non-Bid.
- b. Compares CEI & Contingency lump sums versus percentages at the category level. Projects can have lump sum or percentages but never both.
- c. Checks that a project has at least one (1) Road Segment.
- d. Checks that all items are assigned to a Fund Package.

3.3.3 Counties Tab

Each project must have at least one county associated to it and its Percentage must equal 100%. Failure to associate a county will prevent the generation of the preliminary detail estimate report. The Primary County selected should match the county that is used in IPM.

When adding a County at the Project summary screen, click the **New** button, a blank row will open to enter the county information.

The screenshot shows the 'Project Summary' screen for 'Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) ...'. The 'Counties' tab is active, displaying a table with two rows of county data. Annotations include: a red box around the 'New' button; a red box around the 'Save' button; a red box around the 'App. C' label; a red box around the 'Primary' checkbox; a red box around the 'Percentage' column; a red box around the 'County ID' column; and a red box around the 'Primary' checkbox. Arrows point from these boxes to text labels: 'Select County from pull-down' points to the 'County ID' column; 'All together Must equal 100.00' points to the 'Percentage' column; 'Check the Primary County, used in IPM' points to the 'Primary' checkbox; and 'Click the Save button when finished' points to the 'Save' button.

County ID	Percentage	Primary
C046 ISLE OF WIG	60.0000	<input checked="" type="checkbox"/>
C090 SURREY	40.0000	<input type="checkbox"/>

App. C

Select County from pull-down

All together Must equal 100.00

Check the Primary County, used in IPM

Click the Save button when finished

Figure 5 - The Counties tab

To add a County:

6. When the **Counties tab** is displayed, if it is not showing a blank row, click the **New button** and enter the following information:
7. **County ID:** this is a search field. Enter the **county number or name** and then select the appropriate code from the drop-down menu. See **Appendix D** for a complete listing.
8. **Percentage:** this is a **required field** and will **default to 100**.
 - This is the percentage of the Project that is associated with this County.
9. **Primary: Checkbox** – This should always be checked.
 - **One county must be flagged as the Primary County**, which is the **controlling county**. Since the County Percentage must be 100%, this county must be flagged as Primary.
10. When the county information has been entered, click the **Save button**.

3.3.3.1 Deleting a County from a Project

To **remove a County** from a Project, select the Counties tab and select the County row's Action Menu and select **Delete**. After the row turns grey, click on **Save** to complete the delete.

To **change a County to a different County**, go to the Counties tab and select the County ID field and change to the new **County ID**, and then select **Save**.

3.3.4 District Tab

Each project must have at least one District and its associated Residency assigned to the project, which can be found in iPM.

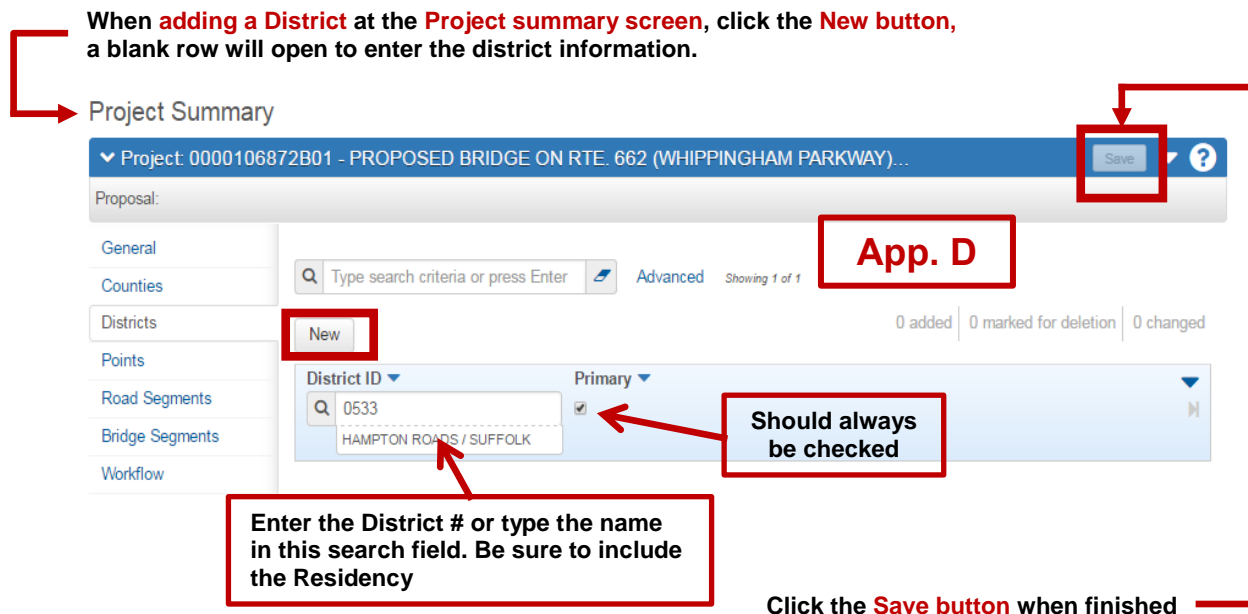


Figure 6 - The Districts tab

To add a District:

- When the District tab displays, if it is not showing a blank row, click the **New** button and enter the following information:
- District ID:** This is a search field. Hit the **Enter** key or enter all or part of the District number or name and select the appropriate **District** from the drop-down list.

<u>District</u>	<u>District No.</u>
Bristol	1
Salem	2
Lynchburg	3
Richmond	4
Hampton Roads	5
Fredericksburg	6
Culpeper	7
Staunton	8
Northern VA	9

- Primary: Checkbox** – This checkbox indicates that the District is the **first or principal district** in which work will be performed for this project.
 - If there are **multiple Districts**, then **one District must be flagged as the Primary District**.

3.3.5 Points Tab

Each project must have at least one Project Point for the “From and To description”, and the longitude and latitude for the project

All fields on the Points tab are **required** when you access this tab, enter data and save it.

When adding a Points (location) at the Project summary screen, click the New button, a blank row will open to enter the point information.

Project Summary

Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY)...

Proposal:

General

Counties

Districts

Points

Road Segments

Bridge Segments

Workflow

New

Type: Midpoint

Location: FROM: 0.53 MI. SOUTH OF ROUTE 17 TC TO: 1.58 MI. NORTH OF ROUTE 663

Latitude: 36:57:09.00

Longitude: 76:31:04.00

Category ID

Enter the Long/Lat, in the middle of the project, be sure it is on the road or pavement.

Always Midpoint

Enter the From and To descriptions from IPM

Leave blank

Click the Save button when finished

Figure 7 - The Points tab

To add Points (location) information:

8. When clicking the points tab, if it is blank, click the **New button** and enter the following information:
9. **Type field Required:** This field will default to **Midpoint** and can only be **Midpoint**.
10. **Latitude field Required:** Enter the Latitude using this format **36:36:43.00**.
11. **Longitude field Required:** Enter the Longitude using this format 80:23:27.00. The negative should not be entered.
12. **Location field Required:** Enter the **Residency Name or Various** (Ex: Saluda Residency)
13. **Category ID field:** Not used, leave blank.
14. **Location fields:** Not used, leave blank.

Note about Long/Lat: If a project spans a large area, provide the Long/Lat at the center of the work area. The Long/Lat fields are used by the Civil Rights Division to determine DBE goals using a 75 mile radius from the point provided.

3.3.6 Road Segments tab

A road segment is a portion of a road that can be described by a set of starting and ending stationing. A Road Segment should be created for each road on the project. A road segment can be used to locate a specific section of a road as the site for a project's work or a portion of the project's work.

When adding a Road Segment at the Project summary screen, click the **New** button, a blank row will open to enter the road segment information.

Project Summary

▼ Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKW..)

Save

Proposal:

General

Counties

Districts

Points

Road Segments

Bridge Segments

Workflow

Type search criteria or press Enter

Advanced Showing 1 of 1

State Project Number

0662 046 664 0030

New

WHIPPINGHAM PARKWAY

S - SECONDARY 664

Name

WHIPPINGHAM PARKWAY

Road System*

S - SECONDARY

IPM

Route*

0662

Begin Station

101+65.08

Optional

End Station

103+17.94

Category ID

leave blank

Road Section Number

664

Description*

Primary

Enter Primary

Lane Mile

Optional

Length

Width

Applied Depth

Figure 8 - The Road Segments tab

The fields on the Road Segment tab are:

- 14) **Name:** Leave blank
- 15) **Road Section No.:** Enter **F18**. This is the fiscal year that the schedule is Let.
- 16) **Description Required:** Enter the description of the type of work performed on this project. EG: Plant Mix Overlay or Primary Plant Mix Resurfacing or Various
- 17) **Lane Mile:** A unit of measure **one standard lane wide and one mile long**. **Note: The Lane miles should not be separated between Road Segments, the project total Lane Miles should be entered in the *first* road segment of a project if there is more than 1 Road Segment.**
- 18) **Length:** Leave blank
- 19) **Width:** Leave blank
- 20) **Applied Depth:** Leave blank
- 21) **Road System Required:** The functional class of the road (obtained from the title sheet of the road plans). Select the appropriate code from the drop-down menu.
- 22) **Route Required:** Enter **Various**.
- 23) **Beginning Station:** Leave blank
- 24) **Ending Station:** Leave blank
- 25) **Lane Mile:** Leave blank
- 26) **Category ID:** Leave blank
- 27) **Location fields:** Not used, leave blank.

3.3.7 Bridge Segments Tab

The Bridge Segment tab is not used for Schedule/Maintenance work. Skip this Tab.

3.4 Project Workflow

The Workflow tab is a crucial step in moving an estimate through the phases of the software to produce the Contract document. Users should make the proper selection for all Projects and the Prime according to the table below.

The screenshot shows the 'Project Summary' window. At the top, it says 'Project: 000000010755! - Belmont Crossing'. Below this is a 'Proposal:' section. On the left, there is a sidebar with tabs: General, Counties, Districts, Points, Road Segments, Bridge Segments, and Workflow. The 'Workflow' tab is selected. In the main area, under 'Workflow', there is a dropdown menu set to 'VDOT PROJECT-PROPOSAL-CONTRACT'. Below that, under 'WorkflowPhase', there is a dropdown menu set to 'PROJECT DEFINITION PHASE'. There are 'Save' and '?' buttons in the top right corner.

Figure 9a - The Workflow Tab – Project

The screenshot shows the 'Prime Project Summary' window. At the top, it says 'Prime Project: 0000107151B10 - FROM: Bridge over I-95 @ Exit 52 TO: Bridge over I-95 ...'. Below this is a 'Proposal:' section. On the left, there is a sidebar with tabs: General, Projects, and Workflow. The 'Workflow' tab is selected. In the main area, under 'Workflow', there is a dropdown menu set to 'VDOT PROJECT-PROPOSAL-CONTRACT'. Below that, under 'WorkflowPhase', there is a dropdown menu set to 'PROJECT DEFINITION PHASE'. There are 'Save' and '?' buttons in the top right corner.

Figure 9b - The Workflow Tab – Prime

Workflow Phase Definitions			
	WORKFLOW NAME	DESCRIPTION	NOTES
1	Project Definition Phase		Engineers/Designers Use
2	Proposal Definition Phase		Construction Division/District SAPP Coordinators
3A	Advertisement Phase	Locks Proposal/No changes from Projects	Any changes once the Proposal is Advertised must be added in the Addenda phase with proper notification to Document assembly group
3B	Addenda Phase	Changes only reflected when Addenda is open	Changes made during Advertisement.
4	Bid Letting Phase		Construction Division Use Only
5	Post Bid Evaluation Phase		Construction Division Use Only
6	Preconstruction has ended Phase		Construction Division Use Only
7	Moved to Construction/SiteManager	Passed to CLR/SiteManager	Construction Division Use Only
8	Historical Phase		Construction Division Use Only

ADMIN
Role
Only

3.5 Retrieving a Project

To open an existing project:

1. Click on **Projects** from the Preconstruction Dashboard located on the Home page.
 - This will take you to the **Project Overview** screen.
2. Clear out the Search by **clicking on the broom**, then **enter the Project ID** and hit **Enter**.
3. The **Project Summary** row will come up. Make sure that the Project ID is correct and **click on the Project ID**.
4. The **Project Summary** screen opens with the **correct Project ID** being displayed.

Enter the **UPC number** in the search box, search automatically begins after the 3rd digit is typed.

Project Overview

▼ Project Overview Save ?

Q 105110 System Default Showing 0 of 8 0 changed

Project	Type
0000105110C01	CR - CR CONSTRUCTION RAAP
Control Proj	Descr
Yes	RTE 106 - IMPROVE INTERSECTION
0000105110C02	CR - CR CONSTRUCTION RAAP
Yes	RE 106 - IMPROVE INTERSECTION

Click the Project ID to open.

Figure 10 – Selecting and Opening a Project

3.6 Deleting a Project

Note: Prior to deleting a project, **YOU MUST** disassociate the project from the Prime and the Proposal if attached. *See Prime and Proposal Sections for details.*

To delete a project

6. Enter the UPC in the search field.
7. Select the row action button for the project you wish to delete.
8. Select **Delete**.
9. The row will turn **grey** and can be **reversed** by clicking the **Undo** button.
10. Click the **Save** button to delete the Project.



Project Overview

▼ Project Overview

Q 106872 System Default Showing 5 of 5 0 changed

0000106872B01	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)		
No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK		▼
0000106872B36	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)		
Yes	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK		▼
0000106872C01	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)		
No	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK		▼
106872B01_old	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)		
No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK		▼
Project	Type		
XXXX106872B01	CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)		
Control Proj	Descr		
No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK		▼

Actions

- Copy
- Delete
- Exclude from Search Results
- View
- Tasks
- Change Project Spec Book
- Check Out Project To Estimator
- Create Proposal From Project
- Export Project To Estimator

Project Type

XXXX106872B01 CMMR - CMMR MAINTENANCE RAAP (UNIQUE UPC)

Control Proj Descr

No PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK

Use this button to **reverse the Delete** before the Save button is clicked

To **confirm the delete** click the Save button

Figure 13 - Deleting a project

3.7 Copying a Project

To copy a project from the Project Overview screen:

6. Click on the Project's row Action Menu button to open up the Action Menu and click on Copy.
7. When you click on Copy, it will bring up the Copy Project screen displaying the old Project to be copied.
8. Enter a new and unique Project ID..
9. Click the Copy button on the Copy Project header to complete the copy.
10. The Project will copy without errors or warnings. When completed, the Copy will return the user to the copied Project's Project Summary General tab displaying the new Project ID.

Click the row action button of the project you wish to copy, Select Copy

Project	Type
0000106872B01	CMMR - MAINTENANCE RAAP
Control Proj	Descr
No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CREEK
0000106872B36	CMMR - MAINTENANCE RAAP
Yes	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

A new window opens. Enter a new unique Project ID and click the Copy button

Copy Project

Copy Project: 0000106872B01

New Project ID*
0000106872B02

Item Code Table
07 - 2007

Unit System
English

Federal Project Number
STP-BR05(258)

Project Type
CMMR - MAINTENANCE RAAP

State Project Number
0662-046-664, B636

Urban/Rural
U - URBAN

Copy

Figure 14 - Copying a Project from the Project Overview Screen

3.7.1 Copy a Project (Alternate Method)

As an alternative, the copy can be performed from within a **Project** from the General Tab.

- Click the blue component bar action button and select **Copy**.
- Enter a new **Unique Project ID** and the click the **Copy** button.

Project Summary

▼ Project: 0000106872B36 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Proposal: C0000106872B36

General

Project ID
0000106872B36

Project Description *

BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

City/Cnty
046 - 046 ISLE OF WIGHT

Primary Project County ID
C046 - ISLE OF WIGHT

Actions

- Add New
- Copy
- Tasks
 - Change Project Spec Book
 - Check Out Project To Estimator
 - Create Proposal
 - Export Project To Estimator
 - Lock Project
 - Validate Project
- Views
 - Attachments

A new window opens. Enter a new unique Project ID and click the Copy button

Copy Project

▼ Copy Project: 0000106872B01

New Project ID *

0000106872B02

Item Code Table
07 - 2007

Unit System
English

Project Description
PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED ISLAND CK

Federal Project Number
STP-BR05(258)

Project Type
CMMR - MAINTENANCE RAAP

State Project Number
0662-046-664, B636

Urban/Rural
U - URBAN

Figure 15 - Copying a Project from within a Project

3.8 Validating a Project

Please see Chapter 8 of this manual for complete Project Validation information.

4. CATEGORIES

Precon Categories are systematically programmed to distinguish between Bid & Non-Bid and separate types of items into specific groups. Categories act as the parent of the (child) Items. Categories must exist before Items can be added in Precon. The Category number must be 4 digits and a separate category must be created for these different areas:

- **Regular Bid Items**
- **(Bid) Demolition of Buildings** (Clearing of Parcels, Closing Wells, Removal of Underground Storage Tanks, Removal of Asbestos)
- **(Bid) Betterment / Utility Relocation**
- **(Non-Bid) State Forces** (Police Patrol, ROW monuments, Railroad, Work performed by state resources, Utility Inspector, etc.)
- **(Non-Bid) Contract Requirements** (Incentives/Dis-Incentives) Refer to Chapter 5 for more details
- **(Non-Bid) Construction Engineering and Inspection (CEI)** Refer to Chapter 5 for more details
- **(Non-Bid) Contingency** – Refer to Chapter 5 for more details

Categories are identified with a four-digit number (this is required) and fall in two distinct types:

1. **Bid Category** (items the contractor will bid/build) or
2. **Non-Bid Category** (overhead costs VDOT incurs that the contractor does not bid/use).
- 3.

The following Category numbering scheme IS REQUIRED for Categories:

- **REGULAR BID Category numbers 0001 - 1999** Ex: 0100, 0150, 0200, 0300, 0400, etc.

Examples:

Road Design, Traffic
or Bridge Project

0001 - REGULAR BID ITEMS

Utility Project Example:

0100 - WATER

0200 - SEWER

- **NON-BID Category number 2000 - 2999** Work performed by State Forces

Examples: Police Patrol, State Force work,
Utility Inspector, Railway

2000 - STATE FORCES

- **NON-BID Category numbers 3001 – 3003**

Construction Eng (CEI) Lump Sum: **3001**

3001 - CEI LUMP SUM

Contract Requirements: **3002**
(Use Incentives/Disincentives here)

3002 - CONTRACT REQUIREMENTS

3002 - INCENTIVES/DISINCENTIVES

Contingency Lump Sum: **3003**

3003 - CONTINGENCY LUMP SUM

The Categories tab contains a **list of all existing Categories** associated with the project. Each Category row contains **detail information for that Category**.

- To **expand a Category row**, select the Category in the list and click on the **Expand button** for that row.
- Each row contains an **Action Menu** that lists actions that can be performed for the Category.

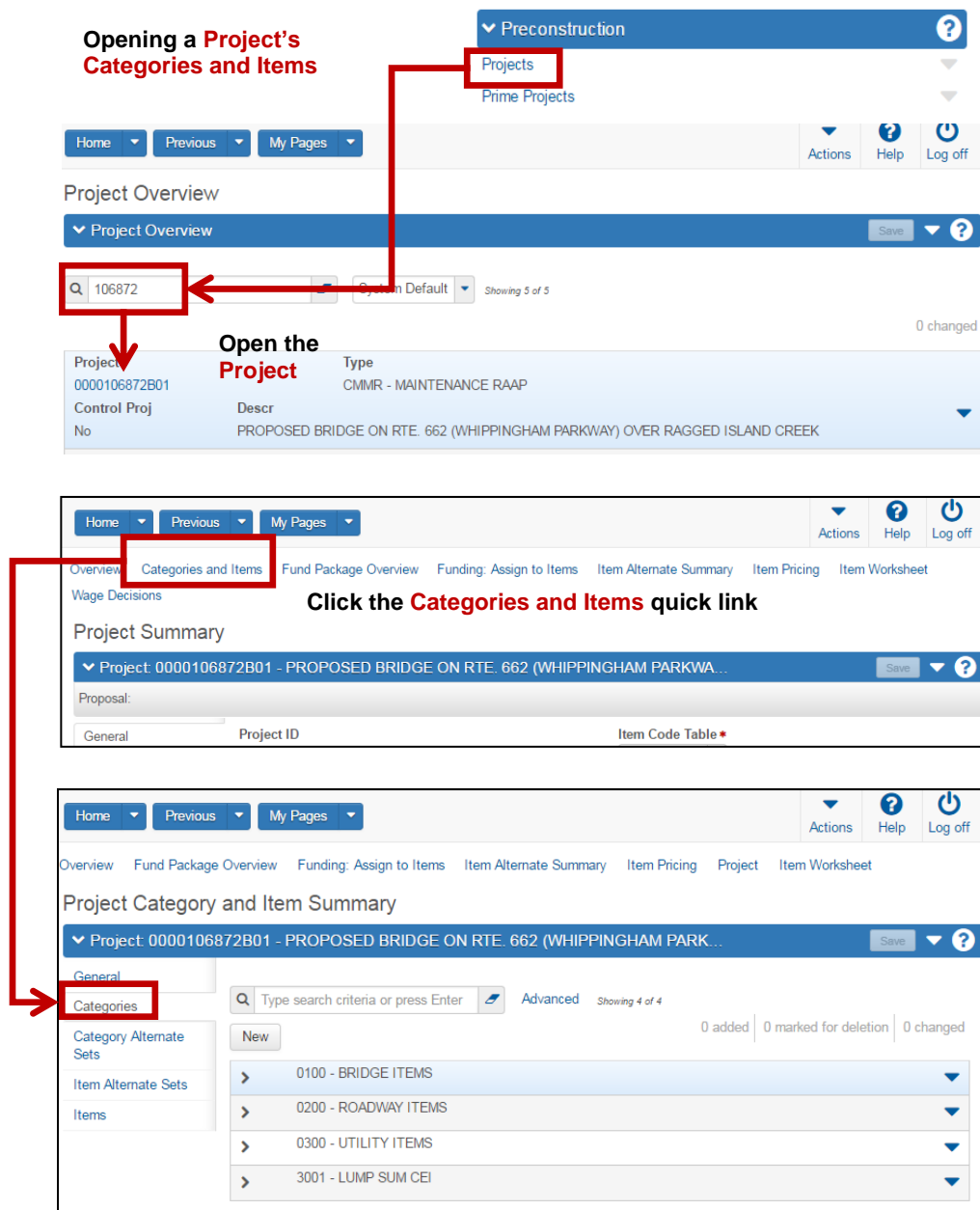



Figure 4 - Project's Category and Items Summary Screen

4.1 Adding a Category

To add a new Category in a Project perform the following steps:

1. Select the Categories Tab.
2. Click the **New button**
3. If the new Category is not expanded to show the fields, click the **Expand**  **button**.
4. Enter information in the fields listed.
5. Click **Save** when you are finished to save the new Category.
6. The system displays a message to confirm that the new information was successfully saved.

When adding a Category at the Project summary screen, click the **New button**, a blank row will open to enter the category information.

Project Category and Item Summary

Project: 0000106872B01 - PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OV...

General

Categories

Category Alternate Sets

Item Alternate Sets

Items

New

0100 - BRIDGE ITEMS

Category ID 4 Digits

0100

Category Description Label Category

BRIDGE ITEMS

Proposal Section Number Always 0001

0001

Combine Like Categories Almost Always

☒

Construction Eng Pct See 5.3

0.00

Contingency Pct Hint: Regular Categories Only

5.00

Activity Code 631=Fed 731=State

731 - 731 CONTRACT COSTS REGULATORY

Maintenance Activity Maintenance Only

Asset Type

5 - STRUCTURES AND BRIDGES

Category Alternate Set ID Used only for Alternate Bidding

Category Alternate Member ID

Federal Eligibility (Y/N) iPM

N

Federal Structure Id Bridge Only

FWHA Type Code Appendix F

08 - 08-NEW BRIDGE

Federal Work Code Appendix G

NWBR - NWBR-NEW BRIDGE

Low Cost Flag

Yes

Life Cycle Cost Not Used

Click the **Save button** when finished

Figure 2 - Adding a New Category

CATEGORY FIELD DESCRIPTIONS:

Category ID (Number) Required: Enter the unique 4-digit category number. Use the following format to number the categories:

Regular bid items (including field office): 0100, 0200, 0300, 0400, etc.

Non-bid items

State Forces, Police Patrol, RW Monuments, Utility Inspector,
Railway, etc: (2000-2999)

Lump Sum CEI (3001)

Contract Requirements (Incentives/Disincentives) (3002)

Lump Sum Contingency (3003)

Note that when the estimate is printed, the categories will be arranged numerically; therefore, some thought should be given to the category number assignments.

For Bid Options or Alternates: The Construction Division plan reviewer section is responsible for building bid options/alternates when necessary.

Category description Required: Enter a description. Ex: REGULAR BID ITEMS

Proposal Section Number: Defaults to “0001” and should always be 0001.

Combine Like Categories: The checkbox will default to checked ☒ and should not be changed. This field combines several different categories (as long as the funding source and funding percentages are the same) into a single proposal section.

Construction Eng. Pct (aka CEI): A percentage entered in this field will calculate the CEI costs for all the items under that Category. NOTE: CEI percentages should only be used on Regular Bid Item Categories (Categories 0001 through 1999). **For Non-Bid Categories 2000-3003, the value should always equal zero.**

Contingency Pct Required: When a number is entered in this field, it will calculate that percentage for all the items in that Category. NOTE: Contingency percentages should only be used on Regular Bid Item Categories (Categories 0001 through 1999). **For Non-Bid Categories 2000-3003, the value should always equal zero.**

Contingency costs are based on L&D’s IIM-LD-249 - 2-Tiered Approach to Project Oversight:

<http://www.virginiadot.org/business/resources/LocDes/IIM/IIM249.pdf>

1. Tier I (< or = 10 Million) = **5.0** percent

OR

2. Tier II (> 10 Million) = **10.0** percent

Note: If you use the Lump Sum method for entering the Contingency, you must enter 0.00 in this field, please see 5.3 of this manual for complete details.

Activity Code Required: Choose appropriate value from the drop-down menu. This field classifies and distinguishes between the federal and state funding pool for the Cardinal financial system. This is not to be confused with the Funding packages within a Preconstruction estimate.

The Engineering Divisions uses most often:

a.) 631 = Federal (Participating)

b.) 731 = NonFED (State – Non Participating)

Utilities:

a.) 656 = Federal

b.) 756 = State

Demolition of Buildings:

a.) 668 = Purchase of Buildings - Federal

b.) 768 = Purchase of Buildings –NonFED (State)

Maintenance Activity: This field is for maintenance-funded projects only, Maintenance project should enter 72000, otherwise leave this field blank.

Asset Type: Select an appropriate choice from the pull-down for maintenance-funded projects only.
Leave this field blank

Category Alternate Set ID: A unique identifier assigned to each Category Alternate Set in the Category Alternate Set List. Category alternate sets contain one or more alternate members, and can be used to determine Section alternatives. A Project may contain multiple category alternate sets. Alternates are the Construction Division Plan reviewer's responsibility. **Leave this field blank.**

Category Alternate Member ID: A unique identifier assigned to each category alternate member of a Category Alternate Set. A Category cannot be assigned to a Category Alternate Set without identifying a Category Alternate member. Alternates are the Construction Division Plan reviewer's responsibility. **Leave this field blank.**

Federal Eligibility Required: Enter Y or N. This designation can be found in iPM.

Federal Structure ID: Enter the 5-digit HTRIS Structure ID. This is a unique 5-digit number assigned to the structure and may be found on the first screen of the structure inventory in the HTRIS system. (This is not to be confused with the 4-digit Structure Number assigned by the State of Virginia.) Enter the Structure ID in the first 5 spaces of this field, leaving the remainder of the field blank. (Enter leading zeroes if necessary to fill 5 spaces.) If it is not a bridge project, leave this field blank.

The District Safety Inspection personnel in the Districts shall be contacted for the Structure ID.

FHWA Type Code: Choose appropriate value from the drop-down menu. This table consists of specific Federal Work Type codes. See Appendix F.

Federal Work Code: Choose appropriate value from the drop-down menu. See Appendix G.

Low Cost Flag: **Display only** – cannot be changed on this screen. A system generated indicator for a Category Section, or bid item that contributes to the low cost total in an estimate.

Life Cycle Cost: The expected maintenance cost over the life of the work being performed. The value is added to the bid amount for the alternate category in low cost calculations and decisions, but it is not part of the actual award amount. **Leave this field blank.**

4.2 Copying a Category

If you are adding a new category to a project that is similar to another category, you can **create a copy of the existing category** and **assign it a new Category ID**. This saves the time it would take to enter all the category detail information again. You can then make any minor changes required for the new category. **Note: All items that are within the Category are also copied.**

- You can copy a category to the current project or another project, and choose whether to include associated data such as locations, funds, and alternate sets.
- The Category may be copied into any existing Project in your Control Group.

Follow these steps to **copy a Category**:

1. On the **Project Summary** screen, click the **Categories and Items Quick link**.
2. On the **Project Category and Item Summary** screen, click the **Categories tab**.
3. Locate the Category you want to copy, and select **Copy** from the Actions Menu on the Category row.
 - The system takes you to the **Copy Category** screen.
4. If you are **copying the Category to another Project**, enter the **destination Project's ID** in the Project ID field.
5. Click in the **Category ID** field, and replace the value with a **unique ID** for the new Category.
 - Be sure to follow the **format for numbering Categories**.
6. If you want to **copy associated information to the new Category**, select the appropriate check boxes for the type of data you want to copy: **Copy Fund Packages**, **Copy Alternate Sets**, and **Copy Locations**.
7. Click the **Copy Category to Project** button on the screen header.
8. The system **validates the new Category ID**, **adds the new Category to the destination Project**, and takes you back to the Categories tab.
9. When you **copy a Category to the same Project**, all the information in the source Category is copied to the new Category with the following exceptions and differences:
 - The **Low Cost Flag** field values are determined automatically by the system after the copy is made.
 - **Project Item Line Number** field values in the copied Category will not necessarily match the source values, but will be determined by the order of insertion into the Project.
10. When you **copy a Category to another Project**, all the information in the source Category is copied to the new Category with the following exceptions and differences:
 - The **Low Cost Flag** field values are determined automatically by the system after the copy is made.
 - **Project Item Line Number** and **Project Item ID** field values in the copied Category will not necessarily match the source Project's values, but will be determined by the order of insertion into the destination Project.
11. If you **do not include the Category's associated information** in the copy, the system clears the **Section ID**, **Fund Package ID**, **Alternate Set ID**, and **Alternate Member ID** fields.

Project Category and Item Summary

▼ Project: 0000106872B36 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save ?

General

Categories

Category Alternate Sets

Item Alternate Sets

Items

Q Type search criteria or press Enter Advanced Showing 4 of 4

New

0 added | 0 marked for deletion | 0 changed

> 0100 - BRIDGE ITEMS

Actions

Copy

Delete

Refresh Data

Copy Category

▼ Copy Category: 0100 - BRIDGE ITEMS Copy Category to Project ?

Project ID *

Q 0000106872B36

BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Category ID *

0300

Copy Fund Packages

Copy Alternate Sets

Copy Locations

To copy a Category (and its contents) to another Project, enter the destination Project ID in the Project ID field.

To copy a Category (and its contents) enter the new Category number.

Click the Copy Category to Project button.

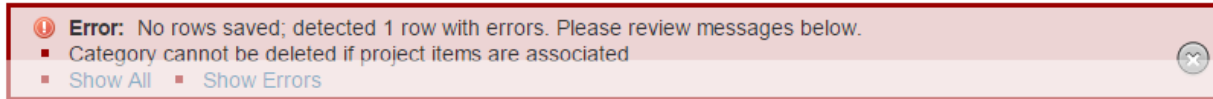
Figure 3 - Copying a Project's Category

4.3 Deleting a Category

There are 2 methods to delete a Category and this is dependent upon whether the Category includes items.

To Delete a category perform the following steps:

1. Select the action button on the Category row you wish to delete
2. Select Delete.
3. If the Category has items within it, the following error displays.



4. If you are certain you want

to delete the Category AND all the items within it, select the action button on the Category row you wish to delete.

5. Select Delete Category and Associated Data.

This means all the items under that Category will be deleted!!

USE EXTREME CAUTION: Once this is selected it deletes automatically. There is no opportunity to Undo!

Project Category and Item Summary

The screenshot shows the 'Project Category and Item Summary' interface. At the top, a blue header bar displays the project name 'Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE' and a 'Save' button. Below the header, a left sidebar contains navigation links: 'General', 'Categories', 'Category Alternate Sets', 'Item Alternate Sets', and 'Items'. The main area features a search bar, a 'New' button, and a table of categories. The table lists categories like '0100 - REGULAR BID ITEMS', '2000 - STATE FORCES', '3001 - CONSTRUCTION ENGINEERING', '3002 - INCENTIVES/DISINCENTIVES LUI', and '3003 - CONTINGENCY LUMP SUM'. A red box highlights the 'Save' button. Another red box highlights the dropdown arrow on the right side of the '0100 - REGULAR BID ITEMS' row. A third red box highlights the 'Delete' option in the context menu that appears when the dropdown is clicked. A fourth red box highlights the 'Delete Category And Associated Data' option in the same menu. Two text boxes with red borders provide additional information: one states 'If Category contains items, Deletion not possible. Deletion only allowed if Category is empty.' and the other states 'Deletes Category and ALL the items within it. CAUTION! Once clicked it automatically deletes. There is no Undo!'.

Figure 4 – Deleting a Category

5. ITEMS

Precon Items have a relationship with Categories. Categories act as the parent of the (child) Items. Categories must exist before Items can be added in a Precon Project. The Items come from an Item Code Table from the current Specification book. There are 2 types of items: **Standard Items** and **Non-Standard items**. A complete list can be found here: <http://www.virginiadot.org/business/const/resource.asp>

The **Items** tab on the Project Category and Item Summary component contains an accordion list of all the items in the project. Each row represents one item. Each row displays an Actions button and values for the **Project Item Line Number, Item ID and Description, Quantity, and Unit of Measure** fields.

If you are working only with the items in a single project category, you can use the **Category ID** filter at the top of the page to filter out of the list all items except those you are working with. Click the **Category ID** down arrow, and select the category you want. You can choose **No Filter** to display all items in the list.

The top screenshot displays the 'Project Summary' page for Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE. The 'Categories and Items' tab is highlighted in the navigation bar. The left sidebar shows a list of categories: General, Counties, Districts, Points, Road Segments, Bridge Segments, and Workflow. The main content area shows project details: Project ID (0000105110CO3), Project Description (RTE 106 - ADD RIGHT TURN LANE), City/Cnty (074 - 074 PRINCE GEORGE), Primary Project County ID (C074 - PRINCE GEORGE), Item Code Table (16 - 2016), Unit System (English), State Project Number ((NFO)0106-074-765, C501), and Federal Project Number (STP-5A27(487)).

The bottom screenshot displays the 'Project Category and Item Summary' page for the same project. The 'Items' tab is highlighted in the left sidebar. The 'Category ID' filter is set to 'No Filter'. The main content area shows a list of items with columns for Item Line Number, Item ID, Description, Quantity, and Unit of Measure. The items listed are:

Item Line Number	Item ID	Description	Quantity	Unit of Measure
45,600.00000	0010	00100 - MOBILIZATION	45,600.00	1.000 LS
10,105.00000	0020	00101 - CONSTRUCTION SURVEYING (10,105.00	1.000 LS

Figure 5 – Project Category and Item Summary Screen

5.1 Lump Sum Items

Lump sum items are items for which a typical unit of measure does not exist (for example, mobilization).

A lump sum item can be defined by three methods:

True lump sum A *true* lump sum item is bid in a lump sum amount (that is, with a quantity of 1). The quantity, at the proposal item level, is grouped together as a single unit and the item is priced and bid as a whole. For true lump sum items, the **Lump Sum** and the **Bid as Lump Sum** check boxes are selected on the Item Summary component.

Fractional lump sum A *fractional* lump sum item has a fractional quantity (greater than 0 but less than 1.0) but, at the proposal level, the quantity must equal a summed quantity of 1.0, and it is bid with a single value. Like true lump sum items, fractional lump sum items have both the **Lump Sum** and the **Bid as Lump Sum** check boxes selected on the Item Summary component.

If a project item has a fractional lump sum quantity, there must be at least one other project item which, when combined at the proposal level, sums the quantity to 1.0. In order to combine, the fractional lump sum items must have the same unit price. Errors are indicated at the proposal item level and on the proposal validation if these conditions are not met.

The same item can be true or fractional depending on how your agency wishes to price that particular item.

Hybrid lump sum A *hybrid* lump sum item has a typical unit of measure and quantity (which may be greater than 1), but is bid in a lump sum amount (that is, with a quantity of 1.0). The **Bid as Lump Sum** check box will be selected, but not the **Lump Sum** check box. For example, a "Clearing and Grubbing" item can be a hybrid lump sum item if its quantity is measured in terms of acres, but it is bid in a lump sum amount.

Characteristics of Lump Sum Items							
Type	Lump Sum Flag	Bid as LS Flag Checked	Has Unit of Measure	Estimate Quantity	Estimate Price for Multiple Occurrences	Proposal Total Quantity	Bid Quantity
True	Yes	Yes	No	1	Same or Different	1	1
Fractional	Yes	Yes	No	$0 < Qty < 1$	Same	1	1
Hybrid	Yes	Yes	Yes	$0 < Qty$	Same or Different	1	1



Note: For hybrid items at the proposal item level and bid item level pages, the quantity is displayed as the estimated quantity, but is calculated based on a quantity of 1.0 for the extended item amount.

5.2 Adding an Item

There are 4 ways to add an item to a Precon project, from either the Categories and Items tab or the Item Worksheet quick link.

The image shows two screenshots of a software interface. The top screenshot, labeled with a red box and a red arrow pointing to the bottom screenshot, shows the 'Project Category and Item Summary' page. On the left, a sidebar menu has 'Categories' selected. A red box highlights the 'New' button, and a red arrow points to the 'Quick Add Items' button in the 'Actions' dropdown. The bottom screenshot shows the 'Project Item Worksheet' page, which is a table of items. A red box highlights the 'Item Worksheet' link in the top navigation bar, and a red arrow points from the 'Quick Add Items' button in the top screenshot to this link. The table in the bottom screenshot has columns for Cat ID, Proj Line N..., Item Num, Descr, Units, Quantity, Est Price, Ext Amt, Suppl D..., and Spe Book NS. The table contains five rows of data.

Top Screenshot: Project Category and Item Summary

Navigation: Home, Previous, My Pages, Actions, Help, Log off

Overview Fund Package Overview Funding: Assign to Items Item Alternate Summary Item Pricing Project **Item Worksheet** 4

Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE Save ?

General Categories Category Alternate Sets Item Alternate Sets Items

1 Type search criteria or press Enter System Default Showing 50 of 58

New 2 Quick Add Items 3 Select Items...

Category ID No Filter 0 added 0 marked for deletion 0 changed

45,600.00 1,000 LS

Bottom Screenshot: Project Item Worksheet

Navigation: Home, Previous, My Pages, Actions, Help, Log off

Overview Categories and Items Fund Package Overview Funding: Assign to Items Item Alternate Summary Item Pricing Project

Project Item Worksheet

Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE Save ?

Project Item Total 351,099.76

Q Type search criteria or press Enter Advanced Showing 50 of 58 0 added 0 marked for deletion 0 changed

Cat ID	Proj Line N...	Item Num	Descr	Units	Quantity	Est Price	Ext Amt	Suppl D...	Spe Book NS
0100	0010	00100	MOBILIZATION		1.000	45,600.00000	45,600.00		
0100	0020	00101	CONSTRUCTION SURVEYING (...)		1.000	10,105.00000	10,105.00		
0100	0030	00110	CLEARING AND GRUBBING		1.000	8,146.10000	8,146.10		
0100	0040	00120	REGULAR EXCAVATION		885.000	39.70000	34,340.50		
0100	0050	00355	GEOTEXTILE (SUBGRADE STA...		1,052.000	3.77000	3,966.04		

Figure 2 – 4 Ways to Add Items

5.3 Deleting an Item

From the Project Category and Item Summary, find the item you want to delete. Select the row actions button for that item and then select **Delete** from the list of actions.

HomePreviousMy Pages

ActionsHelpLog off

OverviewFund Package OverviewFunding: Assign to ItemsItem Alternate SummaryItem PricingProjectItem Worksheet

Project Category and Item Summary

Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE

Save

GeneralCategoriesCategory Alternate SetsItem Alternate SetsItems

Type search criteria or press Enter

System Default

Showing 50 of 58

Category ID

No Filter

0 added0 marked for deletion0 changed

New

>	45,600.00000 0010 00100 - MOBILIZATION	45,600.00 1.000 LS	<div>Actions</div> <div>Delete</div> <div>Duplicate Row</div> <div>Exclude from Search Results</div> <div>Insert Row</div> <div>Views</div> <div>Attachments</div> <div>Links</div> <div>Tracked Issues</div>
>	10,105.00000 0020 00101 - CONSTRUCTION SURVEYING (CONST	10,105.00 1.000 LS	
>	8,146.10000 0030 00110 - CLEARING AND GRUBBING	8,146.10 1.000 LS	

Figure 3 – Delete Item Screen

5.4 Determining Construction Surveying, Mobilization, Construction Engineering (CEI), Contingency and Contract Requirement costs

Two items shall be entered on **every** Road design (Project ID's ending in CXX) and Structure & Bridge (Project ID's ending in BXX) Precon estimate.

1. Construction Surveying (Calculate first) – Item Code **00101**
2. Mobilization (calculation includes Construction Surveying cost) – Item Code **00100**

It is recommended that these two items be entered, with a quantity of 1 and a value of zero, **at the time the rest of the items are entered**. Then calculate and fill in the cost **after** all other items in the estimate are complete. Recalculation of the Construction Surveying and Mobilization may be required if **project totals change**.

5.4.1 Calculating Construction Surveying

All Location & Design and Structure & Bridge projects will contain the pay item Construction Surveying (*Item Code 00101*) and should be entered under a Regular Bid Item Category. The cost is determined by the following:

- Structure and Bridge – **\$1,500 per span**
- Location and Design – **1% of the total project cost**, If there is a Traffic component on the project, calculate 1% of the sum of the “C” (road design) and the “T”(traffic) projects
– **Add \$1,000 for each “D” number.**
- Traffic Engineering – Construction Surveying costs for Traffic engineering projects are calculated and included in the L&D road design estimate.

5.4.2 Calculating Mobilization

All Location & Design projects and all Structure & Bridge projects shall contain the pay item Mobilization (*Item Code 00100*) and should be entered under a Regular Bid Item category as a Lump Sum. The formula for Mobilization can be found in the Spec book in Section 513.

The mobilization calculation includes the cost of Construction Surveying. Traffic engineering projects which are a part of an L&D project will not include Mobilization. The road designers will calculate their Mobilization based upon the sum of the “C” (road design) and “T” (traffic) projects.

FORMULA FOR MOBILIZATION (Spec Book Section 513)

Contract Amount		Total Mobilization Payout Limit
More Than	To and Including	
\$0	\$200,000	10% of total contract amount
200,000	1,000,000	\$20,000 plus 7.5% (of total contract amount minus \$200,000)
1,000,000	More	\$80,000 plus 5% (of total contract amount minus \$1,000,000)

0010 1,300,000.00000 1,000 LS

00100 - MOBILIZATION

Item Number: 00100
MOBILIZATION

Category ID: 0100 - ALL PROJECT ITEMS

Project Item Previous Price:

Project Item Supp Description:

Spec Book# Non-Std:

Unit of Measure: LS

Quantity: 1.000

Estimated Unit Price: 1,300,000.00000

Extended Amount: 1,300,000.00

Price Lock Flag: ☒

Low Cost Flag: Yes

Bid Requirement Code:

Project Item Unit Price Comparison:

Lump Sum: Yes

Bid as Lump Sum: Yes

Non-Bid: ☐

Combine With Like Items: ☒

Item Alternate Set ID:

Alternate Member ID:

Source Of Price: Ad Hoc

Proposal Item Line Number: 0010

Pricing Comments: Estimated

Supplemental Description Required: No

Figure 4 – Mobilization

5.4.3 Calculating Construction Engineering and Inspection (CEI) (Non-Bid Cost)

The Non-Bid Construction Engineering and Inspection (CEI) covers a range of costs and the Project Manager is ultimately responsible for developing and managing the construction engineering and inspection budget. This budget typically is developed after the project plans are complete so it is recommend to use the following formula based on the estimated Construction cost (totals in Precon projects).

Estimated Construction Cost (in Millions)	Construction Engineering %
< 1 M	18.0%
1 - 3 M	17.0%
3 - 6 M	16.0%
6 - 10 M	14.5%
10 - 15 M	13.0%
> 15 M	12.5%
Schedule Work	10.0%

Construction Engineering (CEI) should be entered as a lump sum using **Item Code 25580** and must be entered under **category 3001**, see Chapter 4 for complete details. Item 25580 has a TEC (Total Engineering Cost) unit of measure and the quantity should always be 1.

The screenshot displays a software interface for entering item data. The top header shows the item number 0750, the item name 25580 - CONSTRUCTION ENGINEERING, and the unit of measure TEC - TOTAL ESTIMATED COST. The form contains several fields, some of which are highlighted with red boxes:

- Item Number:** 25580
- Category ID:** 3001 - CEI LUMP SUM
- Non-Bid:** (checked)
- Quantity:** 1.000
- Estimated Unit Price:** 250,000.00000
- Price Lock Flag:** (checked)
- Extended Amount:** 250,000.00
- Source Of Price:** Ad Hoc
- Pricing Comments:** ESTIMATED
- Supplemental Description Required:** No

Figure 5 – CEI Lump Sum

5.5 Contingency (Non-Bid Cost)

The Contingency cost on construction and maintenance contracts is used to capture the potential cost of additional work, unforeseen conditions such as differing site conditions, plan changes etc. **Contingency is a Non-Bid cost and is only calculated for Regular Bid Items (Categories 0001 through 1999).** The following items need to be accounted for in your contingency budget for both construction and maintenance contracts including schedule work:

- Fuel Adjustment
- Asphalt Price Adjustment
- Steel Adjustment
- Ride ability

Contingency costs are based on L&D's IIM-LD-249 - 2-Tiered Approach to Project Oversight:

3. Tier I = **5.0** percent
- OR
4. Tier II = **10.0** percent

If there is more than one federal project number, the contingency cost should be allocated to each federal project. The cost may be divided among other Project ID's, if the Project Manager desires but **if using contingency percentages they must match in all Precon Projects.**

The Contingency cost can be entered in Preconstruction in one of two ways: It must be one or the other, BUT NOT BOTH.

1. As a percentage in the Contingency PCT field on the Category screen (preferred method)
(Entered **Only on Categories 0001 through 1999**)
- OR
2. As a Lump Sum (less common method)

5.5.1 Entering Contingency as a Percentage (Recommended method)

Enter **5.0** or **10.0** in the **Contingency Pct** field under the Regular Category only.

Important note: Contingency percentages should only be entered on Categories 0001 through 1999.

Note to Project Managers: The Contingency percentage must match across all projects in the Prime and/or Proposal.

The screenshot displays a software interface for entering contingency percentages. It features three main sections, each with a category name and two input fields: 'Construction Eng Pct' and 'Contingency Pct'. The 'Contingency Pct' field is marked with a red asterisk, indicating it is a required field.

- 0001 - REGULAR BID ITEMS**: The 'Contingency Pct' field is set to 5.0.
- 2000 - STATE FORCES**: Both the 'Construction Eng Pct' and 'Contingency Pct' fields are set to 0.00.
- 3002 - INCENTIVES/DISINCENTIVES**: Both the 'Construction Eng Pct' and 'Contingency Pct' fields are set to 0.00.

A vertical callout box on the left side of the interface states: "CEI% and Contingency % NOT allowed on Categories 2000-3003".

Figure 6 – Contingency Percentage

5.5.2 Entering Contingency as a Lump Sum (less common method)

Lump Sum Contingency uses **Item Code 25590** and must be entered under **category 3003**.

The Contingency Item 25590 has a TEC (Total Engineering Cost) unit of measure and the quantity should always be 1.

The screenshot shows a software interface for entering a Lump Sum Contingency. At the top, the item number 0770 and category 25590 - CONTINGENCY are displayed, along with a quantity of 1.000 and an extended amount of 85,500.00. The form is divided into two main sections. The left section contains fields for Item Number (25590), Project Item Supp Description, Spec Book# Non-Std, Unit of Measure (TEC), Quantity (1.000), Estimated Unit Price (85,500.00000), Extended Amount (85,500.00), Price Lock Flag (checked), Low Cost Flag (Yes), Bid Requirement Code, Project Item Unit Price Comparison, Lump Sum (No), and Bid as Lump Sum (No). The right section contains fields for Category ID (3003 - CONTINGENCY LUMP SUM), Project Item Previous Price, Non-Bid (checked), Combine With Like Items (checked), Item Alternate Set ID, Alternate Member ID, Source Of Price (Ad Hoc), Proposal Item Line Number, Pricing Comments (ESTIMATED), and Supplemental Description Required (No). Several fields are highlighted with red boxes: Item Number, Category ID, Non-Bid, Quantity, Estimated Unit Price, Price Lock Flag, and the Category ID dropdown.

Field	Value
Item Number	25590
Category ID	3003 - CONTINGENCY LUMP SUM
Quantity	1.000
Estimated Unit Price	85,500.00000
Price Lock Flag	Yes

Figure 7 – Lump Sum Contingency

Note: If using the Lump Sum method for Contingency, be sure that all the Contingency % field is 0.0 at the Category level!

5.5 Contract Requirements (Non-Bid Costs)

The Contract Requirements item was established to capture potential project Incentives/Disincentives (I/D) payments. Users may utilize HUB-CAP or other methods to determine the Maximum cost.

Contract Requirements uses **Item Code 25585** and must be entered under **category 3002**.

Item 25585 has a TEC (Total Engineering Cost) unit of measure and the quantity should always be 1.

0760 15,000.00000 1.000 15,000.00

25585 - CONTRACT REQUIREMENTS TEC - TOTAL ESTIMATED COST

Item Number: * 25585 CONTRACT REQUIREMENTS
Begin typing to search or press Enter

Category ID: * 3002 - CONTRACT REQUIREMENTS

Project Item Supp Description:

Project Item Previous Price:

Non-Bid: ☒

Combine With Like Items: ☒

Item Alternate Set ID:

Alternate Member ID:

Source Of Price: Ad Hoc

Proposal Item Line Number:

Pricing Comments: ESTIMATED

Supplemental Description Required: No

Spec Book# Non-Std:

Unit of Measure: TEC

Quantity: 1.000

Estimated Unit Price: 15,000.00000

Extended Amount: 15,000.00

Price Lock Flag: ☒

Low Cost Flag: Yes

Bid Requirement Code:

Project Item Unit Price Comparison:

Lump Sum: No

Bid as Lump Sum: No

Figure 8 – Requirements / Incentives & Disincentives

6. FUND PACKAGE Overview & FUNDING: Assign to Items

A *fund package* is used to assign funding to the project items and to define that grouping with a Fund package name. **For the majority of VDOT Projects, only One Fund Package is necessary**, as funding is typically the same for the entirety of a project. An exception to this rule is a project that contains betterment. **Fund Packages must equal 100% and all items must be assigned to a Fund Package.**

The procedures are as follows:

1. Assign Pre-Defined Fund Package or Create a new Custom Fund Package.
2. If a New Custom Fund Package was created – add the funding specifics to the Custom Fund Package.
3. Assign Funding to Items.

6.1 Pre-Defined Fund Packages

VDOT has 4 Standard Pre-Defined Funding Packages at your disposal, they are:

Fund Package ID*	Fund Package Description*	Project Level Funding Source ..	Funds
100FED	100% FEDERAL FUNDS	<input type="checkbox"/>	1
100ST	100% STATE FUNDS	<input type="checkbox"/>	1
80/20	80% FED / 20% STATE	<input type="checkbox"/>	2
90/10	90% FED / 10% STATE	<input type="checkbox"/>	2

Packages

Figure 6
–
VDOT's
Pre-
Defined
Fund

6.1.1 Funding Specifics for Pre-Defined Fund Packages

Fund Package ID *	Fund Package Description *	Project Level Funding Source ..	Funds
100FED	100% FEDERAL FUNDS	<input type="checkbox"/>	1
Fund AF03	Description 100% FEDERAL PARTICIPATION	Priority * 1	Fund Type * Federal
Percentage 100.0000	Fund Limit 	Accounting Fund 00055002	Funding Group
100ST	100% STATE FUNDS	<input type="checkbox"/>	1
Fund S100	Description 100% STATE FUNDS	Priority * 1	Fund Type * Non Federal
Percentage 100.0000	Fund Limit 	Accounting Fund 	Funding Group
80/20	80% FED / 20% STATE	<input type="checkbox"/>	2
Fund AF01	Description 80% FEDERAL PARTICIPATION	Priority * 1	Fund Type * Federal
Percentage 80.0000	Fund Limit 	Accounting Fund 00055002	Funding Group
S400	20% STATE FUNDS	1	Non Federal
20.0000			
90/10	90% FED / 10% STATE	<input type="checkbox"/>	2
Fund AF02	Description 90% FEDERAL PARTICIPATION	Priority * 1	Fund Type * Federal
Percentage 90.0000	Fund Limit 	Accounting Fund 00055002	Funding Group
S400	20% STATE FUNDS	1	Non Federal
10.0000			

Figure 2 – Funding Specifics for VDOT’s Pre-Defined Fund Packages

6.1.2 Example of a Betterment Custom Fund Package

Fund Package	Description	Project Le...	Fu...
80/20	80 FED / 20 STATE (91.1818 Betterment, 7.0546 Fed, 1.7636 State)	<input type="checkbox"/>	3
BETTERMENT	100 percent Betterment	<input type="checkbox"/>	1

Sewer Category	
AF01	80% FEDERAL PARTICIPATION
1	Federal 7.0546
Fund	Description
S600	STATE FUNDS
Prior	Class
1	State
Percentage	Limit
1.7636	
Cust ID	
B001	B001-BETTERMENT FUNDING
1	Other 91.1818
	00003230 - COVIN...

Water Category	
Fund	Description
B001	B001-BETTERMENT FUNDING
Prior	Class
1	Non Federal
Percentage	Limit
100.0000	
Cust ID	

Figure 3 – Betterment Custom Fund Package Example

6.2 Methods to Add Fund Packages

There are 2 methods to Add a Funding Package to a Project:

1. Select a Fund Package from a Pre-Defined List (Most common method)
2. Create a New Custom Fund Package from scratch (that is not in the Pre-Defined List)

Home Previous My Pages Actions Help Log off

Overview Categories and Items **Fund Package Overview** Funding: Assign to Items Item Alternate Summary Item Pricing Item Worksheet Wage Decisions

Project Summary

▼ Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE Save ?

Proposal:

Overview Categories and Items Funding: Assign to Items Item Alternate Summary Item Pricing Project Item Worksheet

Fund Package Overview

▼ Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE Save ?

2 1 Type search criteria or press Enter Advanced Showing 4 of 4

New Select Fund Packages...

To use a Pre-Defined Fund Package
Click the **Select Fund Packages** button

Click the **New** button to create a New Custom Fund package that is different than the Pre-Defined Fund Packages.

0 added | 0 marked for deletion | 0 changed

Figure 4 – Two Methods to Add a Fund Package

6.2.1 Adding a Pre-Defined Fund Package

Perform the following steps to add a Pre-Defined Fund Package to a Project.

1. From an open project, click the Fund Package Overview quick link.
2. Click the **Select Fund Packages** button, a new window will open.
3. Click **Show first 10** in the middle of the screen.
4. Select the desired Fund Package from the list, a green check mark displays to the right of the chosen package in the list.
5. Click the **Add Fund Package** button.
6. **Go to 6.3** for the next step.

Overview Categories and Items Funding: Assign to Items Item Alternate Summary Item Pricing Project Item Worksheet

Fund Package Overview

▼ Project: 0000105110C03 - RTE 106 - ADD RIGHT TURN LANE Save ?

Search [Type search criteria or press Enter] Advanced Showing 4 of 4

New Select Fund Packages... ← Click the **Select Fund Packages** button

0 added | 0 marked for deletion | 0 changed

Select Reference Fund Packages

Search [Type search criteria or press Enter] Advanced

Select: All None 0 selected

Enter search criteria above to see results (or) Show first 10 ← Click **Show first 10**

Select Reference Fund Packages

1 selected

Fund Package ID	Fund Package Description
100FED	100% FEDERAL FUNDS
100ST	100% STATE FUNDS
✓ 80/20	80% FED / 20% STATE
90/10	90% FED / 10% STATE

Click **Add Fund Package** → Add Fund Package

Fund Package ▼ Description ▼ Project Level . Funds ▼

80/20 80% FED / 20% STATE 2

Figure 5

Adding a Pre-Defined Fund Package

6.2.2 Creating a New Custom Fund Package

Perform the following steps to Create a new Custom Fund Package for a Project.

1. From an open project, click the Fund Package Overview quick link.
2. Click the **New** button, a new window will open.
3. Add a **New Fund Package** name in the Fund Package field. *Keep the name as short as possible.*
4. Enter a **Description** in the description field.
5. Click the **SAVE** button on the blue component bar.
6. **Caution: the Project Level Check box – should NEVER be checked.**
7. **Go to 6.2.2.1 to complete this task.**

The screenshot shows the 'Fund Package Overview' page. At the top, there are navigation tabs: 'Overview', 'Categories and Items', 'Fund Package Overview' (highlighted with a red box), 'Funding: Assign to Items', 'Item Alternate Summary', 'Item Pricing', 'Item Worksheet', and 'Wage Decisions'. Below these is a 'Project Summary' section with a dropdown menu showing 'Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE' and a 'Save' button. Below this is a 'Fund Package Overview' section with a similar dropdown menu and a 'Save' button (highlighted with a red box). Below the dropdown menu is a search bar with the text 'Type search criteria or press Enter' and a 'Select Fund Packages...' button. Below the search bar is a 'New' button (highlighted with a red box) and a 'Select Fund Packages...' button. Below the 'New' button is a form with two main fields: 'Fund Package' and 'Description'. The 'Fund Package' field contains the text '80/20 BTRMNT'. The 'Description' field contains the text '80 FED/ 20 STATE (91.1818 BTRMNT, 7.0546 FED & 1.7636 STATE'. To the right of the 'Description' field is a 'Project Lev...' checkbox, which is unchecked and labeled 'Do NOT Check'. Below the 'Fund Package' field is a label 'Add New Fund Package Name, Keep as short as possible'. Below the 'Description' field is a label 'Add description'. Below the 'Project Lev...' checkbox is a label 'Click Save' pointing to the 'Save' button in the top right corner of the 'Fund Package Overview' section.

Figure 6 – Creating a New Custom Fund Package

6.2.2.1 Adding Custom Funding Specifics

Perform the following steps to Add Funding Specifics to the new Custom Fund Package.

1. Click the **0** on the right of the screen of the new fund package or click the row action down arrow and Select **Open**.

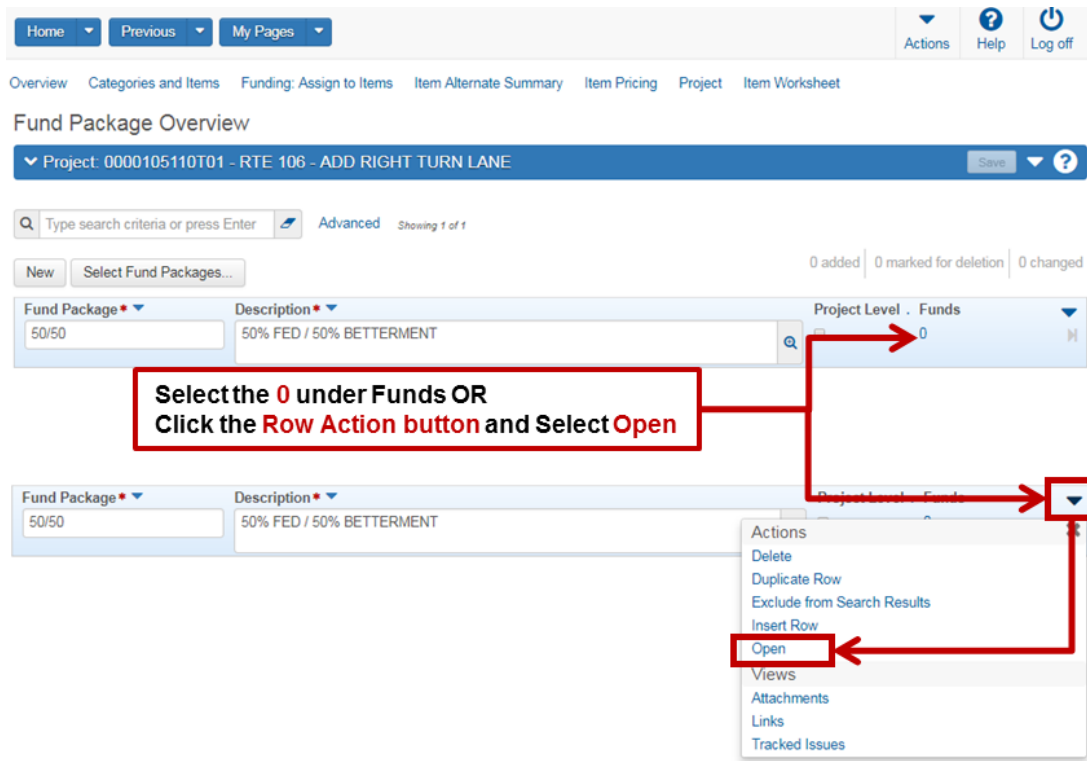


Figure 7 – Two ways to open Fund specifics

Adding Funding Specifics Continued

2. Click the **Select Funds** button.
3. Perform a search in the search box or Click **Show first 10** and select from the list.
4. Click the **Add to Fund Package** button.
5. Fill in **1** in all the **Priority** fields
6. Change the percentage field as required.
7. Ensure the Total of all equal 100%
8. Click the **Save** button on the blue component bar.

Fund Package Summary

▼ Project: 0000105110U01 - RTE 106 - ADD RIGHT TURN LANE Save ?

Fund Packages 80/20 BTRMNT - 80/20 (91.1818 BTRMNT, 7.0546 FED & 1.7636 STATE) 1 of 1

Fund Package ID * 80/20 BTRMNT Fund Package Description * 80/20 (91.1818 BTRMNT, 7.0546 FED & 1.7636 STATE)

Project Level Funding Source ☐

▼ Funds in Package

Select Funds... Click **Select Funds** 0 marked for deletion | 0 changed

Select Funds

Search: Type search criteria or press Enter Advanced Remove selected filter

Select: All None

Fund	Description	Type	Pct
✓ AF04	XX% FEDERAL PARTICIPATION	Federal	0.0000
✓ S600	STATE FUNDS	Non Federal	0.0000
✓ B001	B001-BETTERMENT FUNDING	Non Federal	0.0000

Priority should always be 1

Add to Fund Package

Fund	Description	Prior *	Class *	Percentage	Limit	Cust ID	Fund Grp
S600	STATE FUNDS	1	Non Federal	1.7636			
B001	B001-BETTERMENT FUNDING	1	Non Federal	7.0546			
AF04	XX% FEDERAL PARTICIPATION	1	Federal	91.1818		00055002 - ...	

Must total 100% Click **Save**

Figure 8 – Adding funding specifics

6.3 Funding:Assign to Items to a Project (for Pre-Defined Fund Packages)

Assigning funds will be dependent on the type and/or the number of Fund package(s) a project contains.

Perform the following steps to Assign Funding to all the items:

1. Click the **Funding: Assign to Items** quick link.
2. Click the **Radial button** on the All Project Items row.

The screenshot shows the 'Funding: Assign to Items' page in a web application. The top navigation bar includes 'Home', 'Previous', 'My Pages', 'Actions', 'Help', and 'Log off'. The main navigation area has links for 'Overview', 'Categories and Items', 'Fund Package Overview', 'Funding: Assign to Items' (highlighted with a red box), 'Item Alternate Summary', 'Item Pricing', and 'Item Worksheet'. Below this is the 'Project Summary' section for 'Project: 0000106872C01 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK'. The 'Project Funding Assignment' section shows a table with columns 'All Project Items', 'Mixed', 'None', and 'A'. The 'A' column has a red box around it with an arrow pointing to it and the text 'Click the Lettered Radial button'. To the right of the table is a 'Fund Package' table with columns 'Fund Package' and 'Description'. The 'Fund Package' table has two rows: '(A) 80/20' with description '80% FED / 20% STATE' and 'Fu...' with description '2'. Below the table is a 'Save' button (highlighted with a red box) and a 'Collapse All' link. A yellow banner at the bottom says 'There are unsaved changes.' with a close button. A red arrow points from the 'Save' button to a red box labeled 'Click Save'.

Home Previous My Pages Actions Help Log off

Overview Categories and Items Fund Package Overview **Funding: Assign to Items** Item Alternate Summary Item Pricing Item Worksheet

Wage Decisions

Project Summary

▼ Project: 0000106872C01 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save ?

Project Funding Assignment

▼ Project: 0000106872C01 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save ?

All Project Items Mixed None **A** 0 changed Collapse All

0100 - ROADWAY ITEMS

0200 - UTILITY ITEMS

► Fund Package Description

(A) 80/20 80% FED / 20% STATE

Fu... 2

Project Funding Assignn There are unsaved changes. x

▼ Project: 0000106872C01 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save ?

All Project Items Mixed None **A** 0 changed Collapse All

0100 - ROADWAY ITEMS

0200 - UTILITY ITEMS

► Fund Package Description

(A) 80/20 80% FED / 20% STATE

Fu... 2

Click Save

Figure 9 –Funding: Assign to Items

6.3.1 Funding:Assign Funding to a Project (for a Custom Fund Package)

Assigning funds will be dependent on the type and/or the number of Fund package(s) a project contains. Perform the following steps to Assign Funding to all the items:

1. Click the **Funding: Assign to Items** quick link.
2. Click the **Radial buttons** for each Category to correspond to the correct fund package.

Click Expand All to show Fund specifics

Home Previous My Pages

Overview Categories and Items Fund Package Overview Item Alternate Summary Item Pricing Project Item Worksheet

Project Funding Assignment

▼ Project: 0000017630U01 - RTE 264 - INTERCHANGE IMPROVEMENT Save ?

In Addenda phase, no Addendum is open.

All Project Items

Mixed None A B C D

Mixed None A B C D

Mixed None A B C D

Mixed None A B C D

Mixed None A B C D

0100 - WATER - VIRGINIA BEACH

0200 - SANITARY SEWER

0300 - HRSD

0400 - WATER - NORFOLK

0 changed

Expand All

Fund Package	Description	Fu...
> (A) HRSD	HRSD (300)	3
> (B) NORFWTR	WATER - NORFOLK (400) 90	2
> (C) SEWER	SEWER (200)	3
> (D) VABWTR	WATER - VA BEACH (100)	3

Check radial buttons to correspond with the Fund package on the right

Figure 10 –Funding: Assign to Items

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6.4 Deleting a Fund Package

Perform the following steps to delete a Fund Package. You must have a project open to do this.

1. Click the **Fund Package Overview** quick link.
2. Select the row action button for the Fund Package row.
3. Select **Delete**.
4. Click the **Save** button on the blue component bar.

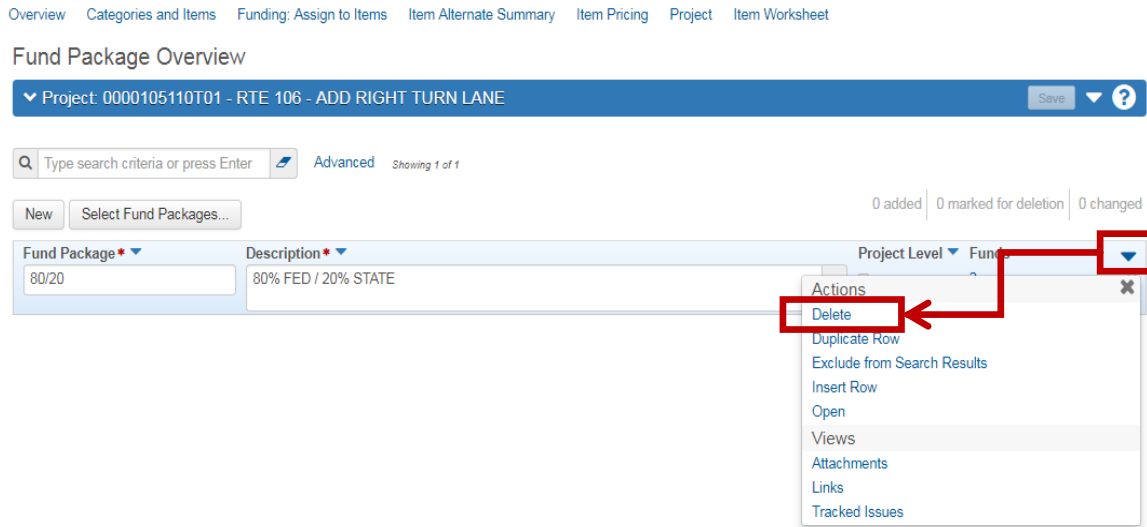


Figure 11 – Deleting a Fund Package

7. ITEM PRICING

The Item Pricing quick link allows you to generate or change units prices for project items.

Preconstruction uses a regression model for item prices as a function of specific price qualifiers. The system uses Market Area (currently set to “District”) as a variable in the regression analysis. The regression model is based on the top three (3) bidder’s history, for a 24 month window and is updated monthly. See the Bid-Based Regression Model methodology, later in this chapter.

District and Statewide Average price reports published on the VDOT website is based on an average price model that uses the Market Area (District) and Quantity as variables to generate the average prices. Both reports are run monthly and are based on the same 24 month window as the regression model.

The system will allow the user to enter their own price manually or have the system generate a bid-based price from the historical bid data. **It is recommended to generate the bid-based prices for all the items in the project(s).** If the quantity of an item is outside the quantity range of the bid history (24 months), the system will generate a price that may not be suitable. The system will notify the user that the quantity is out of range in the item pricing comments field. **It is advised that the user refer to other resources to evaluate and determine an appropriate price when the quantity is out of range of the historical data.**

Preconstruction will not generate prices for Non-Standard items. Therefore, the engineer and or designer will need to determine a logical price and enter it manually.

VDOT’s Construction Division maintains Historical Pricing here:

<http://www.virginiadot.org/business/const/resource.asp>

Included are:

- Two-year historical bid pricing listing
- Statewide averages listing
- Districtwide averages listing
- 3-month District Average listings

VDOT employees may utilize the Staunton database to determine prices, found here:

[http:// stauntonapps/main/bridge/inside_vdot/items.asp](http://stauntonapps/main/bridge/inside_vdot/items.asp)

Note: The bid data in this location is updated quarterly..

All of VDOT’s Historical bid history can be found on the Bid Express website, please note this is not a free service and users outside of VDOT will need to pay a subscription fee. <https://www.bidx.com>

VDOT employees may request access to Bid Express for free by contacting Mary “Kiwi” Roane kiwi@roane@vdot.virginia.gov with your Name, phone number and email and she will request an account for you. Accounts created on the Bid Express site must be logged in monthly to keep the account active.

7.1 Generate Bid-Based Prices for an Entire Estimate

The system updates the value in the Price field and changes the Est Type to either Regression or Average, depending on which estimation model is chosen. The Ext Amount and Project Item Total fields are also automatically updated. If no historical information is available for an item, the system updates the Price field with the reference price and changes the Est Type to Reference. If reference price information is not available, the system leaves the price as it was or blank.

To generate Prices for an Entire estimate perform the following steps:

1. Click the **Item Pricing** quick link. A new screen opens and the categories in your estimate are listed.
2. Select the **Component Action Button**.
3. Select **Price All Items**.
4. A message will display once the process is complete.
5. Return the General tab and change the **Date of Gen Bid Base Prices** field to the date the prices were generated.

The screenshot shows the 'Item Pricing' interface. At the top, there are navigation tabs: Home, Previous, My Pages, Actions, Help, and Log off. Below these are project navigation links: Overview, Categories and Items, Fund Package Overview, Funding: Assign to Items, Item Alternate Summary, Item Pricing (highlighted), and Item Worksheet. The 'Project Summary' section shows the project name '0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE'. The 'Price Project Item Overview' section shows the same project name and a 'Project Item Total' of 351,099.76. A search bar is present with the text 'Type search criteria or press Enter'. A table lists project items with columns 'Cat ID', 'Descr', and 'Project Items'. The table contains five rows of data. A dropdown menu is open, showing options: Actions, Tasks, Price All Items (highlighted), Views, Attachments, Issues, Links, Project Attachments and Links, and UserManual. A message at the bottom states 'Prices generated for All Categories in project'.

Cat ID	Descr	Project Items
0100	REGULAR BID ITEMS	54
2000	STATE FORCES	1
3001	CONSTRUCTION ENGINEERING (CEI) L	1
3002	INCENTIVES/DISINCENTIVES LUMP SU	1
3003	CONTINGENCY LUMP SUM	1

Figure 7 – Generate Bid-Based Prices for entire estimate

7.1.1 Generate Prices for a Category

To generate historical prices for a specific Category perform the following steps:

1. Click the **Item Pricing** quick link.
2. Click the row Action Button of the **Category** you wish to price.
3. Select **Price Category**.

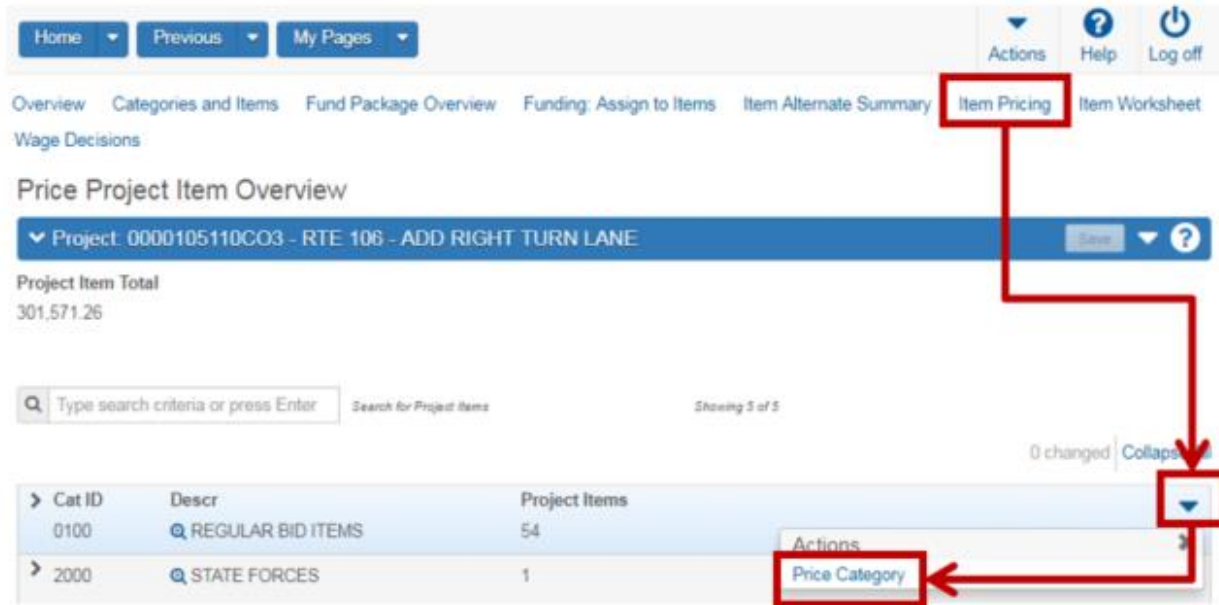


Figure 2 – Generate Bid-Based Prices for Category

7.1.2 Generate a Bid-Based Price for an Individual Item

To generate a historical price for an individual item perform the following steps.

1. Click the **Item Pricing** quick link.
2. Expand the **Category** of the item you wish to price.
3. Click the row action button of the item you wish to price.
4. Click **Price Item**.

The screenshot shows the 'Price Project Item Overview' page for Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE. The 'Item Pricing' link is highlighted in the top navigation bar. Below the project header, a search bar and a table of project items are visible. The first item, 'REGULAR BID ITEMS', is expanded, showing a list of items. The second item, 'GEO TEXTILE (SUBGRADE STABILIZATION)', is selected, and its details are shown. The 'Est Price' field is highlighted, and the 'Price Item' action is selected from the dropdown menu. The 'Price Comments' field shows 'Using county'. The 'Src Price' dropdown is set to 'Regression'.

Proj Li...	Item	Descr	Unit	Suppl Descr	
0040	00120	REGULAR EXCAVATION			
Quantity	865.000	Est Price	42.02000	Ext Amt	36,347.30
0050	00355	GEO TEXTILE (SUBGRADE STABILIZATION)			
Quantity	1,052.000	Est Price	3,73000	Ext Amt	3,923.96

Updated Bid-Based Price

System generated comment providing source of price

Figure 3 – Generate Price for Individual Item

7.1.2.1 Bid-Based Regression Model methodology

The bid history model calculates the regression coefficients for an individual item by **quantity** and **District**. The model performs the following steps when generating the regression price for an item.

1. Perform an initial regression model using only quantity and date (24 month date range).
2. Remove (10%) outliers based upon the parameter settings.
3. Exclude the date variable from the models if it is not within the minimum of 24 month history and a minimum number of thirty (30) observations.
4. Include only the top three (3) bidders.
5. Determine which models can be calculated for an item based upon the minimum number of twenty (20) observations needed.
6. For each item to be modeled, calculate the level of improvement (0.2) for each potential variable to be included in the estimation regression models.
7. Select variables to be included in the models for which the level of improvement (0.2) is significant.
*
8. Run the estimation regression models including all variables which pass the selection requirements for number of observations, level of improvement, and parameter settings.
9. Calculate statistics on these models.
10. Exclude regressions that have a positive quantity relationship (price increases as the quantity increases)** or are out of range when compared to the average.

*The Level of Improvement to Add for Regressions option sets the level of improvement a regression model must have over the base model before keeping it. For example, when considering a regression with just area as a parameter, a value of .20 (the default) indicates that the regression model must have a .20 level of improvement over the base regression model that does not include area. Otherwise the model with area is excluded from further analysis.

** If a regression is found to have a positive quantity coefficient (price increases as the quantity increases), selecting the Exclude Regressions with Positive Quantity Coefficients for Regressions option will exclude the regression calculation for the item. While this may be valid for the item, it usually indicates further analysis should be done before using the model's regression analysis for the item.

7.1.2.2 Pricing comments field

The system fills in the Price comments field when the prices are generated from the bid-based history, a glossary of possible comments are as follows:

1. Using minimum* quantity of n

**Minimum range of quantities found in the 24 month regression model.*

2. Using maximum quantity of n**

***Maximum range of quantities found in the 24 month regression model.*

3. Using average quantity of n

If **Area** (District/City/County) is used in addition to quantity to determine price, “*and county*” is appended to the above values, e.g. “Using maximum quantity of n and county.”

If **Area** (District/City/County) is used but not quantity, Price Comments is set to “Using county.”

Note: **Area** = consists of VDOT District and the cities and/or counties that are within that District.

7.1.3 Enter a Price Manually

If you know the price of a particular item or the database does not generate one for you, to enter a price manually perform the following steps.

1. Click the **Item Pricing** quick link.
2. Expand the **Category** of the item you wish to price.
3. Enter your price in the **Est Price** field
4. Click the **padlock icon** to lock the price.

Note: Locking the price is important so that when the Generate price process is run, it does not overwrite the price that you entered.

5. The Src Price field automatically populates Ad Hoc.

The screenshot shows the 'Price Project Item Overview' page for Project: 0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE. The 'Item Pricing' tab is selected. A red box highlights the 'Item Pricing' tab in the top navigation bar. Another red box highlights the 'Save' button in the top right corner. A red arrow points from the 'Item Pricing' tab to the 'Save' button. A third red box highlights the 'Est Price' field for the item '0040 00120 REGULAR EXCAVATION'. A red arrow points from the 'Est Price' field to the 'Save' button. A fourth red box highlights the 'Padlock' icon next to the 'Est Price' field. A red arrow points from the 'Padlock' icon to the 'Save' button. A red arrow points from the 'Padlock' icon to the text 'Click Padlock to lock price'. A red arrow points from the 'Est Price' field to the text 'Change Amount'.

Cat ID	Descr	Project Items
0100	REGULAR BID ITEMS	54
0040 00120	REGULAR EXCAVATION	CY
865.000	38.54000	33,337.10
0050 00365	GEOTEXTILE (SUBGRADE STABILIZATION)	SY
1,052.000	3.51000	3,692.52

Figure 4 – Enter a Price Manually

7.2 Price Scatter Plot

VDOT uses the BAMS/DSS HREG profile which allows users to View a Scatter Plot of prices from the 2-year Bid History.

If the item record includes a quantity, that information is used as an additional parameter in the profile. The system displays the scatter plot in a new browser window.

To View a Scatter Plot, perform the following steps:

1. Open the project of your choice.
2. Select the **Item Pricing** quick link.
3. Expand the **Category** you wish to view.
4. Select the **Row Action** button for the row you wish to see the scatter plot.
5. Select **Open Scatter Plot**

The screenshot shows the VDOT BAMS/DSS HREG interface. At the top, there are navigation tabs: Home, Previous, My Pages, Actions, Help, and Log off. Below these are project-specific links: Overview, Categories and Items, Fund Package Overview, Funding: Assign to Items, Item Alternate Summary, Item Pricing (highlighted with a red box), and Item Worksheet. The main section is titled 'Price Project Item Overview' and shows a project summary for '0000105110CO3 - RTE 106 - ADD RIGHT TURN LANE' with a total of 301,571.26. A search bar is present with the text 'Type search criteria or press Enter'. Below the search bar, there is a table of project items. The first item is '0100 REGULAR BID ITEMS' with 54 items. A red arrow points to the 'Item Pricing' link in the top navigation bar. Another red arrow points to the 'Item Pricing' tab in the project overview section. A third red arrow points to the 'Open Scatter Plot' option in the row action menu for the first item. The row action menu also includes options like 'Exclude from Search Results', 'Price Item', 'Views', 'Attachments', 'Links', and 'Tracked Issues'.

Proj ...	Item	Descr	Unit	Suppl Descr
0050	00355	GEOTEXTILE (SUBGRADE STABILIZATION)		
Quantity	1,052.000	Est Price	3.51000	Ext Amt
				3,692.52
0060	10128	AGGR. BASE MATL. TY. I NO. 21B		
Quantity	173.000	Est Price	48.00000	Ext Amt
				8,304.00
0070	10250	NS AGGR. MATERIAL		
Quantity	294.000	Est Price	46.50000	Ext Amt
				13,671.00

Figure 5 – How to View a Scatter Plot

The Scatter Plot is an interactive window where you can move your cursor over the dots in the graph to show additional information in the upper right corner of the graph. This data is based on the past 2 years.

CONSTRUCTION SIGNS 24160, Profile GHIREG

This model does not require specifying a spec year. Ignoring the supplied spec year 07.

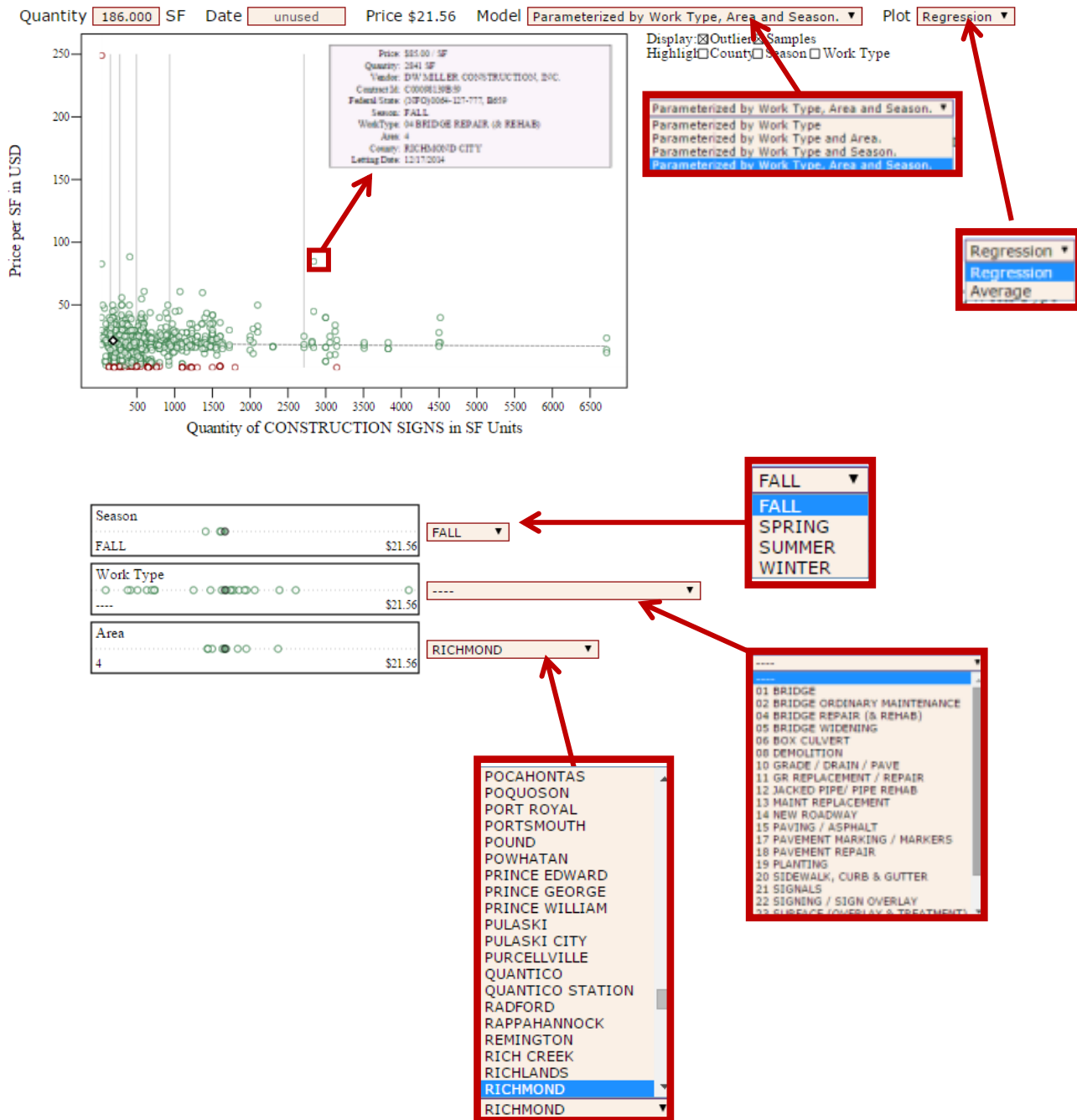


Figure 6 – Scatter Plot Overview

8. VALIDATIONS & REPORTS

The final step in completing a Precon Project is to validate that errors do not exist and run reports.

8.1 Validating a Project

All Precon Projects **MUST** be validated to check for errors. The validation process generates a list of warnings about the state of the project and does not stop further processing. Validation can be performed at any time in the estimate life-cycle but should be run before the user runs reports.

There are 2 Validations that MUST be run for each project.

1st Validation = System Validation (2 methods)

2nd Validation = VDOT specific –Project Validation Button

8.1.1 System Validation - from the Project Overview

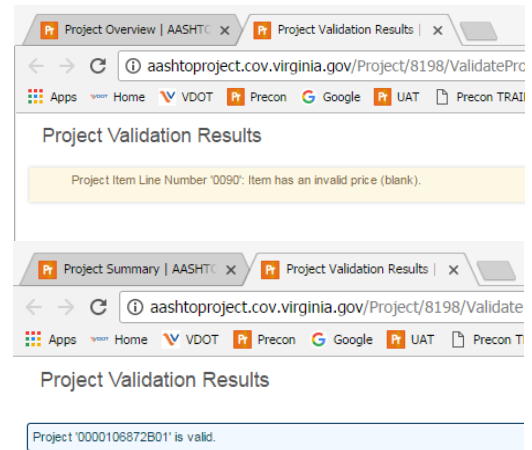
To run the System validation of a project without opening it, perform the following steps:

1. Navigate to Project Overview screen
2. Enter the UPC in the search box.
3. Select the Row action button for that project
4. Select **Validate Project**.

The screenshot shows the 'Project Overview' screen. At the top, there are navigation buttons: 'Home', 'Previous', and 'My Pages'. On the right, there are 'Actions', 'Help', and 'Log off' buttons. Below the navigation bar, there is a 'Project Overview' section with a 'Save' button and a help icon. A search bar contains the text '106872'. Below the search bar, there is a table of projects. The table has columns for 'Project', 'Type', 'Control Proj', and 'Descr'. The first project is '0000106872B01' with Type 'CMMR - MAINTENANCE RAAP' and Description 'PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED'. A red box highlights the 'Validate Project' option in the Actions menu for this project.

Project	Type	Control Proj	Descr
0000106872B01	CMMR - MAINTENANCE RAAP	No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED
0000106872B36	CMMR - MAINTENANCE RAAP	Yes	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK
0000106872C01	CMMR - MAINTENANCE RAAP	No	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK
106872B01_old	CMMR - MAINTENANCE RAAP	No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED
XXXX106872B01	CMMR - MAINTENANCE RAAP	No	PROPOSED BRIDGE ON RTE. 662 (WHIPPINGHAM PARKWAY) OVER RAGGED

5. A new browser window/tab opens and provides results of validation, error messages will appear here using the color coding described in Chapter 1.
6. If errors occur, close the validation browser tab, make the necessary corrections and then re-run the Validation so that your project is free of errors.

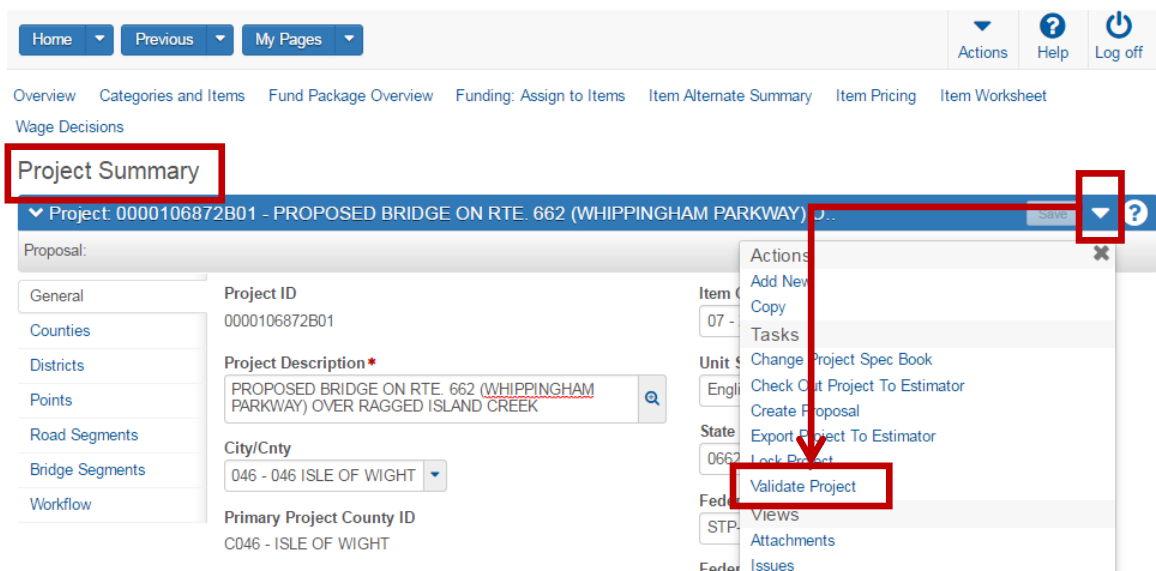


8.1.2 System Validation - from an Open Project

Validation within an open project is available in two locations: Project Summary or Project Category and Item Summary screens.

To validate from an open project, perform the following steps:

1. Navigate to the Project Overview screen.
2. Enter the UPC in the search box.
3. Open the desired project.
4. Select the Row action button from either the Project Summary or Project Category and Item Summary screens.
5. Select **Validate**.
6. A new browser window/tab opens and provides results of validation, error messages will appear here using the color coding described in Chapter 1.
7. If errors occur, close the validation browser tab, make the necessary corrections and then re-run the Validation so that your project is free of errors.



8.2 System Validation Overview

This validation is the standard “out of the box” error checking from the software company and is not customizable by an agency.

8.2.1 PROJECT Validation checks the following:

- The project contains at least one project item.
- The project contains at least one county.
- The sum of the project county percentages equals 100%.
- The project contains at least one district.
- The project contains at least one category.
- VDOT’s agency setting for *Require Project Item Assigned to Category* option is set to *True*, then all project items must be assigned to a category.
- All project items must be assigned to a category.
- All project items must have a quantity.
 - blank, null are not valid, 0 is a warning
- All project items must have a price.
 - blank, null are not valid, 0 is a warning
 - If the **Bid Requirement Code** field is set to *Minimum* for an item, the project item price must be greater than or equal to the value in the **Unit Price Comparison** field.
 - If the **Bid Requirement Code** field is set to *Maximum* for an item, the project item price must be less than or equal to the value in the **Unit Price Comparison** field.
- The project contains a point location record with the word "midpoint" recorded in the **Description** field and recorded values for **longitude** and **latitude**.
- All project items have been funded.
- All fund packages associated with an item must pass funding validations.
- All alternate sets attached to a project item must have an alternate member defined at the item level.
 - For each alternate set, there should be at least one item with an assigned set and member.
- All alternate sets attached to a project category must have an alternate member defined at the category level.
 - For each category alternate set, there should be at least one category with an assigned set and member.

8.2.2 PROPOSAL Validation checks the following:

This validation is the standard “out of the box” error checking from the software company and is not customizable by an agency.

- The proposal has a primary county.
- The proposal has at least one associated project.
- A proposal time record is identified as Main Time.
- Proposal items exist for the proposal.
- All proposal items have a quantity.
 - blank, null are not valid; 0 is a warning.
- All proposal items have a price.
 - blank, null are not valid; 0 is a warning.
 - Unit prices do not fall outside the boundaries of the minimum or maximum value held in the **Unit Price Comparison** field whenever multiple projects containing items with minimum or maximum bid requirements but with different Unit Price Comparison values are added to the same proposal.
- Proposal items identified as fractional lump sums have the same estimated price and quantities that sum to 1.0. For more information about lump sums, please see Chapter 5 for more details.
- All proposal items are assigned to a section (needed for Bid Express).

8.3 VDOT Specific Project Validation button

This is a VDOT specific project validation that should be run in conjunction with the System Validation in the previous section. The button is located at the bottom of the General tab within an open Project.

This Validation must be run for every Precon Project.

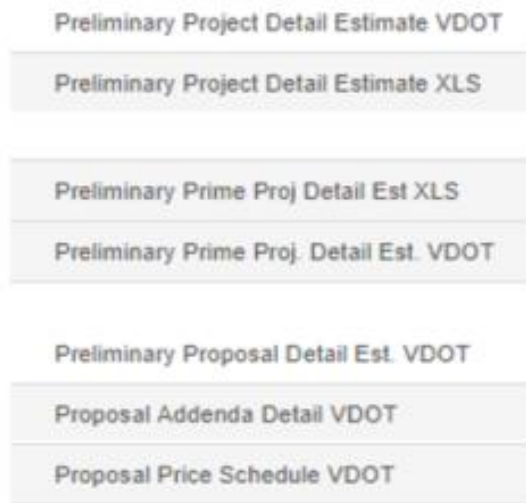
The screenshot shows the 'Project Summary' page for a project named 'TRACEY'S TESTING PROJECT'. The page is divided into a left sidebar with navigation links (General, Counties, Districts, Points, Road Segments, Bridge Segments, Workflow) and a main content area. The main content area is divided into two columns. The left column contains fields for Project ID, Project Description, City/City, Primary Project County ID, Pavement Type, Project Status, Project Work Type, Project Item Total, UPC Number, Plan Reviewer / Estimator, Designer, Job Number (CR, BR, CREW), Control Group, and IPM Interface. The right column contains fields for Item Code Table, Unit System, State Project Number, Federal Project Number, Federal Oversight, Federal ID, FHWA S24, Controlling Project, Primary Project District ID, Urban/Rural, Project Type, Progress Schedule Category, Date of Estimate, Last L D Estimate, and Loaded L D Estimate. At the bottom of the left column, there is a 'Project Validation' button, which is highlighted with a red box and a red arrow pointing to it.

8.3.1 VDOT Specific validation checks the following:

- Checks all Regular/Bid categories do not have items checked Non-Bid.
- Compares CEI & Contingency lump sums versus percentages at the category level. Projects can have lump sum or percentages but never both.
- Checks that a project has at least one (1) Road Segment.
- Checks that all items are assigned to a Fund Package.

8.4 Reports

VDOT has a series of customized reports for Precon Projects, Primes and Proposals. Users should only use reports that contain “VDOT” in the name. Reports that contain “VDOT” are PDF and the XLS is a duplicate of the VDOT version in an Excel format.



Most reports are comprised with different pages that vary per report but this gives the user the ability to turn certain pages on or off by clicking the desired checkbox. For Example:

Generate Report

Generate Report - Preliminary Project Detail Estimate VDOT

SettingsSet Parameters3 of 5

Show Cover Page*

Generate cover page of report.

☒

Show Detail Estimate Summary Sheet*

Generate the summary sheet for project.

☒

Show Detail Cost Estimate*

Generate the item level funding report for project.

☒

Show Detail Estimate Funding Summary*


Generate the funding allocation report for project.

☒

8.4.1 Built-in Error checking features (some reports)

Some VDOT reports have built-in error checking features (that the Validation process does not provide) in this report. *Users should ensure that all red errors are corrected before submission to the Construction Division for Advertisement.*

Users should ensure that the report contains no red errors and that there are no “N” flags for Categories 0001 through 1999. The “N” indicates non-bid, Non-bid Items should only reside in Categories 2000 and higher.



Virginia Department of Transportation

Date Printed: 04/19/2016

Detail Cost Estimate
Page 2 of 6

Project ID: 0000099420TRB

UPC: 00099420

FHWA 534: 16014

Project Description: DO NOT USE/DO NOT DELETE

Category: 0001

REGULAR BID ITEMS

Federal Structure ID: 13312

Road Segment Length:

Road Segment Width:

Bridge Plan No.: 296-71

Num of Spans: 1

Bridge Length: 22.6667 MI

Bridge Width: 24.6667 FT

FHWA Type Code: 14

14-BRIDGE-REHAB-NO ADDED CAPACITY

Activity Code: 631

631 CONTRACT CONSTR - REGULAR - FED

Fed Construction Class:

Line No.	Item Code	Spec Number	Item Description	Alt Set ID	Alt Mem ID	Units	Estimated Qty	Unit Price	Amount	Fund Package ID	Flags*
0170	10635	315	ASPHALT CONCRETE TY. SM-9.5A			TON	100.000	203.71000	20,371.00	80/20	L
0180	11070	315	NS SAW-CUT ASPH CONC (FULL DEPTH)			LF	33.000	5.00000	165.00	80/20	L
0190	24152	512	TYPE III BARRICADE 8'			EA	6.000	337.98000	2,027.88	80/20	L
0200	24160	512	CONSTRUCTION SIGNS			SF	371.000	15.63000	5,798.73	80/20	L
0210	24282	512	FLAGGER SERVICE			HR	40.000	22.61000	904.40	80/20	L
0220	24283	STA.FR.	ERROR ** Non-Bid item in a regular Bid category ** ERROR			TEC	1.000	52,000.00000	52,000.00		N L
0230	24288	512	WARNING LIGHT TY. B			DAY	1,680.000	2.00000	3,360.00	80/20	L
0240	24290	512	TRAFFIC BARRIER SERVICE CONCRETE			LF	37.000	41.20000	1,524.40	80/20	L
0250	24430	508	DEMOLITION OF PAVEMENT			SY	351.000	5.22000	1,832.22	80/20	L

8.4.2 Methods of Running Reports

Precon Reports can be run from the Dashboard or from an open Project, Prime or Proposal.

8.4.2.1 Running Project report from the Dashboard

1. Click the Dashboard Global Action button.
2. Select Generate Report.
3. Choose **Preliminary Project Detail Estimate VDOT** from the list, a green check box appears to the left. It automatically moves to page 2.
4. In the search box, **enter the desired UPC number**.
5. **Click the desired Project ID** from the list, a green check box appears to the left.
6. Click the blue **Next arrow** button on the upper right of your screen.
7. Check or uncheck the boxes from the list of 4 report pages that you desire, all 4 default as checked.
8. Click the **Execute** button on the blue component bar.
9. The report opens in a new Browser tab.

Note: Please remember to save or print the PDF, this is the only time you will have the opportunity to do so. Otherwise, you will have to re-run the report.

8.4.2.2 Running Project report from an open Project

This report can be run in almost every quick link page within a project.

1. Open the desired project.
2. Click the blue component Action Button.
3. Select Preliminary Project Detail Estimate VDOT
4. Check or uncheck the boxes from the list of 4 report pages that you desire, all 4 default as checked.
5. Click the **Execute** button on the blue component bar.
6. The report opens in a new Browser tab.

Note: Please remember to save or print the PDF, this is the only time you will have the opportunity to do so. Otherwise, you will have to re-run the report.

9. PRIME PROJECTS

A Prime Project must be created for every State or Federal project that will be advertised. The Prime acts as a link to all the Projects and thus any changes in the Projects are reflected in Prime reports. The prime combines all the projects from the different disciplines and does two important things. **A Prime is required even if there is only one Project.**

The Prime has 2 functions:

1. Provides the Construction Division Team leader (person that prepares Proposals for Advertisement) the list of correct Preconstruction projects that are to be included in the advertisement. For example: Some advertisements consist of more than 1 UPC or more than 1 bridge.
2. Uploads cost estimate information to the PCES module of IPM, every night at 7pm.

Prime Project ID: Is 14 digits and always begins with a C and ends with the Project ID number of the largest project (most money) and would be the controlling project and the Prime is named per the controlling project name.

For example, if the projects to be combined are: 9845C02, 9845B21, 9845B22, 9845T01 and 9845L02 and the largest (monetarily) is the C02 project then the Prime would be named: Prime Project ID = **C0000009845C02**

Whether you, as a user, create a Prime Project or not can be determined by the three cases described below:

- Case 1:** It is the responsibility of the Project Manager to create the original project and make the appropriate copies for the other disciplines/users on the project team (i.e. Bridge, Traffic Engineering, Environmental, Consultants)
The Project Manager will create the Prime Project and associate all projects to it then move the projects to the team members respective control groups.
- Case 2:** The designer who is not the Project Manager receives a project from the Project Manager. The project has been linked to the Prime Project by the Project Manager. Therefore, this designer will not create a Prime Project unless directed by the Project Manager to do so.
- Case 3:** The designer of a “stand-alone” project (a project in which no other division will be involved) shall create a Prime Project and associate the project(s) to it.

9.1 Prime Controlling Project

A **checkbox** is used to designate a Project as a **Controlling Project**, which is the Controlling Project in a Prime containing multiple projects. **The Project with the majority of the Construction funds/money should be the Controlling project. The name of the Prime will correspond to the name of the controlling project.**

- There can be only **one Controlling Project** designated **per Prime**.
- The Project used for the Prime Project will also be the Controlling Project.
- The cover of the Prime report will be blank if a controlling project is NOT checked.

Prime Project Summary

▼ Prime Project **C000105110C03** FROM: 0.053 MI. S. RTE. 616 (LAUREL SPRING RD)... Save ?

General Select Projects... 0 changed

Projects

Workflow

Project	Descr	Item ...	Unit...	Control...	Fed Proj...	St Proj Num
0000105110C03	RTE 106 - ADD RIGHT	16 - 20	English	Yes	STP-5A27(487)	(NFO)0106-C
0000105110T01	RTE 106 - ADD RIGHT	16 - 20	English	No	STP-5A27(487)	(NFO)0106-C
0000105110U01	RTE 106 - ADD RIGHT	16 - 20	English	No	STP-5A27(487)	(NFO)0106-C

Project Summary

▼ Project **0000105110C03** RTE 106 - ADD RIGHT TURN LANE Save ?

Proposal:

General

Counties

Districts

Points

Road Segments

Bridge Segments

Workflow

Project ID
0000105110C03

Project Description *
RTE 106 - ADD RIGHT TURN LANE

City/Cnty
074 - 074 PRINCE GEORGE

Primary Project County ID
C074 - PRINCE GEORGE

Pavement Type
ASPH - ASPHALT CONCRETE

Project Status
PE - PRELIMINARY ENGINEERING

Project Work Type
CTL - CONSTRUCTION NEW TURN LANES

Project Item Total
301,571.26

Item Code Table *
16 - 2016

Unit System *
English

State Project Number
(NFO)0106-074-765, C501

Federal Project Number
STP-5A27(487)

Federal Oversight
NFO - NO FEDERAL OVERSIGHT

Federal ID
527487

FHWA 531 *
44021

Controlling Project
☒

Figure 1- Prime Controlling Project

9.2 Adding a Prime Project

To add a Prime Project from the Prime Project Overview screen follow these steps:

1. Click on the **Prime Project link** from the Preconstruction Dashboard found on the Home page.
2. Open the Prime Project Overview header's **Action Menu** and click **Add**.
3. The Add Prime Project screen opens.
4. Enter the **Prime Project data** and click the **Save** button when finished.

The screenshot shows the 'Prime Project Overview' interface. At the top, a blue header bar contains a dropdown menu with options: 'Projects', 'Prime Projects' (highlighted with a red box), 'Proposals', 'Lettings', and 'Find Bid Data'. Below this, the 'Prime Project Overview' section has a blue header bar with a 'Save' button and a question mark icon. A red arrow points from the 'Prime Projects' link in the top menu to the 'Add' button in the 'Actions' menu of the 'Prime Project Overview' header. Below the 'Add' button, the 'Add Prime Project' form is displayed. It has a blue header bar with a 'Save' button (highlighted with a red box) and a question mark icon. Red arrows indicate the flow from the 'Add' button to the form fields. The form fields include: 'Prime Project ID*' (with value 'C00105110C03' and a red note 'Must begin with a C'), 'Control Group*' (with value 'LD1A'), 'Project Location' (with a range from '0.053 MI. S. RT 616 (LAUREL SPRINGS RD)' to '0.005 MI. N. RT 616 (LAUREL SPRINGS RD)'), 'Road Name' (with value 'COURTHOUSE ROAD (RT 106)'), 'Federal Project Number' (with value 'STP-5A27(487)'), and 'State Project Number' (with value '(NFO)0106-074-765, C501').

Figure 2 - Adding a New Prime Project

PRIME FIELD DESCRIPTIONS:

Prime Project ID: 14 Digits and must start with a C and ends with the Project ID number. Ex: **C0000104340C01** or **C0000009845C02**

Control Group: The control group is the security designation which decides which user has access to which prime project(s). This field will already be filled out with your control group. The data in this field may be changed in order to transfer the prime project to another control group.

Project Location: Use the first line for the **From:** information and the second line for the **To:** information. Bridge projects will use the location from the title sheet.

Ex: FROM: 0.09 MI. W. WEST HIGHLANDS BLVD.

TO: 0.01 MI. W. WEST HIGHLANDS BLVD.

Federal Project Number: Enter the Federal Project Number, if applicable, in its entirety, complete with dashes, parentheses, etc. If the project is not federally-funded, enter **NONE**. Ex: STP-5A03(264)

State Project Number: Enter the state project number in its entirety, complete with dashes, commas, etc. Ex: 0615-047-169, C501

Federal Appropriation Codes: Not currently used.

Road Name: Enter the name of the road or leave blank.

Ex: HOLLAND ROAD or RTE 628, MCCLELLAN ROAD

9.2.1 Adding/Associating Project(s) to a Prime

To add (link) projects to a Prime perform the following steps:

1. Open the Prime of your choice.
2. Select the **Projects** tab on the left side of the screen.
3. Click the **Select Projects** button.
4. Enter the **UPC number** in the search box.
5. Click all the Projects from the list that belong in the Prime.
6. Click the **Add to Prime Project** button.
7. Click the **Save** button.

The screenshot illustrates the process of adding projects to a Prime project. It shows three sequential steps in the Prime Project Summary interface:

- Step 1:** The 'Projects' tab is selected on the left sidebar. The 'Save' button is highlighted in the top right corner.
- Step 2:** The 'Select Projects...' button is highlighted in the top left corner of the main content area.
- Step 3:** The 'Select Projects' dialog box is shown. The search box contains '105110'. Three projects are listed and selected (indicated by green checkmarks):

Project	Descr	Item Code Tbl	Unit Sys
0000105110C03	RTE 106 - ADD RIGHT TURN	16 - 2016	English
0000105110T01	RTE 106 - ADD RIGHT TURN	16 - 2016	English
0000105110U01	RTE 106 - ADD RIGHT TURN	16 - 2016	English

The 'Add to Prime Project' button is highlighted in the bottom right corner.

Red arrows indicate the flow from the 'Projects' tab to the 'Select Projects' button, then to the search box, and finally to the 'Add to Prime Project' button. A red box highlights the 'Save' button in the top right corner.

Click **Projects** to add to Prime

Figure 3 - Adding Projects to a Prime

9.2.2 Prime Workflow

The Workflow tab is a crucial step in moving an estimate through the phases of the software to produce the Contract document. Users must make the proper selection for all Projects and the Prime according to the table below. Leaving the workflow fields blank, results in reporting errors.

Workflow field: set to **VDOT Workflow Project-Proposal-Contract**

Workflow Phase: set to **Project Definition Phase**

Prime Project Summary

▼ Prime Project: C000105110C03 - FROM: 0.053 MI. S. RTE. 616 (LAUREL SPRING RD)...

General

Projects

Workflow

Workflow

VDOT WORKFLOW PROJECT-PROPOSAL-CONTRACT

WorkflowPhase

PROJECT DEFINITION PHASE

Do not leave these fields Blank

Figure 4 - The Workflow Tab – PRIME

9.3 Disassociating (Removing) Projects from a Prime Project

Warning: When **Remove** is selected, the Project Row is **automatically removed**. There is no opportunity to reverse the selection, as the **row is immediately removed without clicking the Save button**. To restore the row, you must associate the Project back to the Prime Project.

1. Open **Prime**.
2. Click the **row action button** of the appropriate Project.
3. Click **Remove**.

Prime Project Summary

▼ Prime Project: C000105110C03 - FROM: 0.053 MI. S. RTE. 616 (LAUREL SPRING RD)...

General

Projects

Workflow

Select Projects...

0 changed

Project	Descr	Itm ...	Unit...	Actions
0000105110C03	RTE 106 - ADD RIGHT	16 - 20	English	Yes
0000105110T01	RTE 106 - ADD RIGHT	16 - 20	English	Remove
0000105110U01	RTE 106 - ADD RIGHT	16 - 20	English	

Remove

Tasks

Check Out Project To Estimator

Export Project To Estimator

Views

Attachments

Links

Figure 5 - Disassociating (Removing) a Project from a Prime Project

9.4 Deleting a Prime Project

A Prime can be deleted only after all the projects have been disassociated (removed) and some users do not have permission to delete a Prime. If you need a Prime deleted, please contact the Precon Administrator listed in the Support/Help at the beginning of this manual.

To delete a Prime perform the following steps.

1. Open the Prime.
2. Click the **Projects** tab.
3. Remove all **Projects** (see 8.3 for complete instructions).
4. Click the **Overview** quick link.
5. Click the row action button of **Prime** you wish to delete.
6. Click **Delete**.

The image shows two screenshots from a software interface. The top screenshot is titled "Prime Project Summary" and shows a table of projects. The bottom screenshot is titled "Prime Project Overview" and shows a table of prime projects.

Prime Project Summary

Prime Project: C000105110C03 FROM: 0.053 MI. S. RTE. 616 (LAUREL SPRING RD) T... Save ?

General Projects Workflow

Select Projects... 0 changed

Project	Descr	Itm ...	Unit...	Actions
0000105110C03	RTE 106 - ADD RIGHT	16 - 20	English	Remove
0000105110U01	RTE 106 - ADD RIGHT	16 - 20	English	Check Out Project To Estimator Export Project To Estimator

Prime Project Overview

Prime Project Overview Save ?

Type search criteria or press Enter System Default Showing 1 of 1

0 marked for deletion 0 changed

Prime Proj	Location	Actions
C000105110C03	FROM: 0.053 MI. S. RTE. 616 (LAUREL SPRI	Delete Exclude from Search Results Open

Figure 6 - Deleting a Prime

9.5 Running the Prime Project Detail Estimate VDOT Report

The Prime Project Detail Estimate VDOT report is a combined report that calculates the totals for all the projects associated to the Prime.

The report is comprised of four individual reports:

- Cover Page
- Summary Sheet
- Cost Estimate
- Funding Summary

When you generate this report, you can choose to include one, several, or all of these reports.

9.5.1 Running the Detail report from the Dashboard

10. Click the Dashboard **Global Action** button.
11. Select **Generate Report**.
12. Choose **Preliminary Prime Detail Estimate VDOT** from the list, a green check box appears to the left. It automatically moves to page 2.
13. In the search box, **enter the desired UPC number**.
14. **Click the desired Project ID** from the list, a green check box appears to the left.
15. Click the blue **Next arrow** button on the upper right of your screen.
16. Check or uncheck the boxes from the list of 4 report pages that you desire, all 4 default as checked.
17. Click the **Execute** button on the blue component bar.
18. The report opens in a new Browser tab.

Note: Please remember to save or print the PDF, this is the only time you will have the opportunity to do so. Otherwise, you will have to re-run the report.

9.5.2 Running the Detail report from an open Project

This report can be run in almost every quick link page within a project.

7. Open the desired project.
8. Click the **Action Button** on the blue component bar.
9. Select **Preliminary Prime Detail Estimate VDOT**.
10. Check or uncheck the boxes from the list of 4 report pages that you desire, all 4 default as checked.
11. Click the **Execute** button on the blue component bar.
12. The report opens in a new Browser tab.

Note: Please remember to save or print the PDF, this is the only time you will have the opportunity to do so. Otherwise, you will have to re-run the report.

10. PROPOSALS

A Precon Proposal is one or more projects grouped together for advertisement, bid-letting, award and the creation of the Construction Contract.

A proposal is similar to a project in that it contains items or work, but it also contains advertisement info, DBE goals, wage decisions, expected construction completion date and the Contractor's bids. The Proposal combines 'like items' from 1 or more Precon Projects into a single biddable list so that bidders only view and bid on the same item(s) once. The Proposal generates 4 digit proposal line numbers, in increments of 10. Eg: 0010, 0020, 0030.

Proposals can be created in two (2) ways:

1. Creating a proposal **from the controlling project**. (Recommended Method). This pulls general data from the project and automatically assigns the project to the proposal. Then other Projects can be added to the Proposal.
2. Create a proposal **from scratch** – the user will need to add the general information and assign the projects to the proposal.

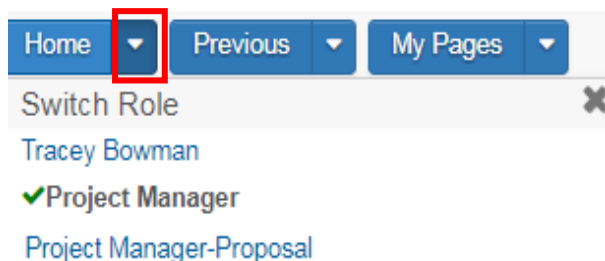
Understanding Your Role

All Precon users are assigned at least one security role. Many users have multiple roles, but you can only use one role at a time. Therefore, you are always limited to the security access rights of your Active Role. Roles combine the permissions needed for several related tasks and allow you more efficient access to the parts of the system you need. Roles are assigned to you based on your location (control group) and the components you need.

You can change your active role at any time by clicking on another role on the **Home** menu. By selecting a different role, your permissions and security access are changed to reflect the areas you need to access to perform your duties in the new role.

**In order to create a Proposal (either from scratch or from an existing project) you must use the Project Manager-Proposal role for all work performed in a proposal.*

***Important Note: Once a project is attached to a Proposal, the project is not viewable from the Project Manager role.*



10.1 Creating a Proposal from a Project (Recommended Method)

To create a Proposal from the controlling project, perform the following steps:

1. From the Preconstruction component select **Projects**. In the search box, query for the project you wish to create a proposal. The Proposal should be created from the controlling project.
2. Select the project row Actions menu and select **Create Proposal from Project**. Be sure to add a C to the beginning of the Proposal ID.
3. Fill in all the required fields and click **Save**
4. Add other Projects if required.

The screenshot displays the 'Project Overview' interface. At the top, there are navigation tabs: 'Home', 'Previous', and 'My Pages'. On the right, there are buttons for 'Actions', 'Help', and 'Log off'. Below the navigation, a 'Project Overview' section contains a 'Save' button and a help icon. A search bar shows '106872' and 'System Default' is selected. A table lists four projects, all with the description 'BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK'. The first project, '0000106872B36', is highlighted. An 'Actions' menu is open for this project, with 'Create Proposal From Project' selected. Below the table, the 'Create Proposal from Project' form is shown. The 'Add Proposal' section includes fields for 'Proposal ID*' (containing 'C0000106872B36'), 'Proposal Description*' (containing 'BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK'), 'Federal Project Number' (containing 'STP-BR05(258)'), 'Primary Fund Type*' (set to 'FED - FEDERAL'), 'Funding Source*' (set to 'CONS - CONSTRUCTION'), and 'Proposal Status'.

Project	Type	Control Proj
0000106872B36	CR - CONSTRUCTION RAAP	No
0000106872B37	CR - CONSTRUCTION RAAP	Yes
0000106872B40	CR - CONSTRUCTION RAAP	No
0000106872C01	CR - CONSTRUCTION RAAP	No

Create Proposal from Project

Add Proposal

Proposal ID*
C0000106872B36

Proposal Description*
BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Federal Project Number
STP-BR05(258)

Primary Fund Type*
FED - FEDERAL

Funding Source*
CONS - CONSTRUCTION

Proposal Status

Figure 8 – Project Overview Screen

10.1.2 Creating a Proposal from scratch (less common method)

To create a Proposal from scratch, perform the following steps:

1. From the **Home** screen, click the **Proposals** quick link.
2. Click the **row action button** on the blue component bar, select **Add**.
3. Fill in all the required fields and click **Save**.
4. Add other Projects if required.

The screenshot shows the 'Proposal Overview' page. At the top, there are navigation tabs: 'Home', 'Previous', and 'My Pages'. On the right, there are links for 'Actions', 'Help', and 'Log off'. Below the navigation, there is a 'Proposal Overview' section with a 'Save' button and a dropdown menu. The dropdown menu is open, showing 'Add' and 'Change Proposal Phase'. A red box highlights the 'Add' button, and a red arrow points from it to the 'Add Proposal' form below. The 'Add Proposal' form has a 'Save' button and a dropdown menu. The form contains several fields, some of which are required (indicated by a red asterisk):

- Proposal ID ***: C0000105893M01 (highlighted with a red box and a red text overlay: 'All Proposals must begin with a C')
- Proposal Description ***: INT. IMPROVE AT RTE 17 (MILLS DRIVE) & RTE 609
- Federal Project Number**: CM-5111(314)
- Control Group ***: LD6A
- State Project Number 1**: (NFO) 0017-088-655, M501
- DBE/MBE Goal Percent ***: 0.00
- Primary Fund Type ***: FED - FEDERAL
- Funding Source ***: CONS - CONSTRUCTION
- Proposal Status**: (dropdown menu)
- Proposal Cost ***: 9.22
- Cost of Full Size Plans ***: 29.48
- Cost of Half Size Plans ***: 10.53

Figure 2 – Creating a Proposal from scratch

Some fields are required; the proposal will not be saved to the database unless the required fields are filled-in. The required fields are listed with a red asterisk behind the field name. Non required fields should also be filled in, if applicable.

Once you have filled in the correct fields, click the **Save** button. If the Proposal ID you created is already in the system, you will receive an error message. You will also receive an error message if you have left any required fields blank.

Error: No rows saved; detected rows with errors. Please review messages below.
■ Advertisement Date: Invalid value "; value is required. (custom rule)

Once the proposal is saved, you will be directed to the Proposal General Tab. Notice that other fields are now displayed on the Proposal General Tab. These fields include:

Proposal Field Descriptions:

Proposal ID: All Proposal ID's *must begin with a C* (excerpt from Appendix A, of this manual) and should match the corresponding Prime ID (which is also the name of the controlling project for the Proposal)

A.4 Prime Project ID and Proposal & Contract ID

Both the Prime Project ID and the Proposal/Contract ID begin with a C and end with the Project ID of the largest project. The Proposal ID and Contract ID should always be the same. The Prime and the Proposal/Contract ID are typically 14 digits.

Example 1: Projects ID's are: 0000003942C01
0000003942B01
0000003942B02

Prime Project = C00000003942C01
Proposal/Contract ID = C00000003942C01

Note: all letters must be CAPITALIZED !

Example 2: Project ID is: M615LMA107318

Prime Project = CM615LMA0107318
Proposal/Contract ID = CM615LMA0107318

Note: The C is added to the Project ID, it does not replace the first digit.

Note: all letters must be CAPITALIZED !

Order Number (aka Call): Contact the Construction Division's Federal Submissions Coordinator for Call number assignment.

Proposal Description: Required. Enter a short description of the work to be performed. This should match the project description from IPM and the Prime.

Location: Type the location with format: **FROM: (location) TO: (location)**.
For Projects with Plans, enter the location from the front sheet title block.

Federal Project No.: Enter the federal project number, if applicable, in its entirety, complete with dashes, parentheses, etc. If the project is not federally-funded, enter NONE.
EXAMPLE: NH-5401(876)

State Project Number 1: Enter the state project number in its entirety, including commas, etc.
EXAMPLE: 7029-021-103, C502

State Project Number 2: Use only when more space is needed for the State Project Number 1 row, otherwise leave blank.

State Project Number 3: Use only when more space is needed for the State Project Number 2 row, otherwise leave blank.

DBE Goal: Select the appropriate code from the drop-down menu. Do not leave this field blank.

DBE GOAL	
BOTH	MBE and WBE Goals or Requirements
DBE	DBE Goals or Requirements
ND	Not Yet Determined
NONE	NO DBE Goals or Requirements
VSBE	VDOT Small Business Enterprise Program

DBE/MBE Goal Percent: Required. Percentage will be determined by the Civil Rights Division & entered by the Construction division staff.

WBE Goal Percent: Percentage will be determined by the Civil Rights Division & entered by the Construction division staff.

SWaM Goal Percent: Percentage will be determined by the Civil Rights Division & entered by the Construction division staff.

Advertisement Date: Required. Enter the Advertisement Date in MM/DD/YYYY format or select the date from the calendar icon.

Rejected checkbox: Used by Construction division, leave unchecked.

Reason for Non-Processing: Used by the Construction Division, leave this field blank.

Prev Let As ContID: This field is not used.

Contract Type: Required. Select the appropriate code from the drop-down menu.

CONTRACT TYPE	
CM	Construction / Maintenance Hybrid
CMMR	Maintenance RAAP
CMMS	Maintenance SAAP
CMSR	Maint. Schedule RAAP
CR	CR Construction RAAP
CS	CS Construction SAAP
DB	DB Construction Design/Build
EM	EM Emergency
LAP	Local Assistance Project
PP	Public/Private Transportation Act

Proposal Type: Select the appropriate code from the drop-down menu.

PROPOSAL TYPE	
01 - GRADING	18 - SEAL COAT
02 - STABILIZATION	19 - REJUVENATING
03 - STRUCTURES	20 - CLEARING AND GRUBBING
04 - BRIDGES	21 - LANDSCAPING
05 - CONCRETE BOX CULVERT	22 - SPRINKLER SYSTEM
06 - RETAINING WALL	23 - PLANTING
07 - HOT BITUMINOUS PAVEMENT	24 - SODDING
08 - CONCRETE PAVEMENT	25 - CURB AND GUTTER
09 - SIGNING	26 - SIDEWALK
10 - STRIPING	27 - BIKEWAY
11 - LIGHTING	28 - GUARD RAIL
12 - SIGNALIZATION	29 - IMPACT ATTENUATER
13 - TOPSOIL	30 - CHANNEL RELOCATION
14 - SEEDING	31 - GRADING AND SURFACING OF CAMPGROUNDS
15 - MULCHING	32 - SAFETY REST AREA WITH COMFORT AND FACILITIES
16 - HOT BITUMINOUS PAVEMENT OVERLAY	33 - PORT OF ENTRY BUILDING AND SCALES
17 - PLANT MIX SEAL COAT	34 - TRAFFIC AND SURVEILLANCE

Contract Work Type: Required. Select the appropriate code from the drop-down menu.

CONTRACT WORK TYPE	
01 - BRIDGE	16 - PAVING / CONCRETE
02 - BRIDGE ORDINARY MAINTENANCE	17 - PAVEMENT MARKING/MARKERS
03 - BRIDGE PAINTING	18 - PAVEMENT REPAIR
04 - BRIDGE REPAIR (& REHAB)	19 - PLANTING
05 - BRIDGE WIDENING	20 - SIDEWALK, CURB & GUTTER
06 - BOX CULVERT	21 - SIGNALS
07 - CURB CUT RAMP	22 - SIGNING / SIGN OVERLAY
08 - DEMOLITION	23 - SURFACE (OVERLAY & TREATMENT)
09 - FENCE REPAIR/REPLACE	24 - UTILITY
10 - GRADE / DRAIN / PAVE	25 - WIDEN ROADWAY
11 - GR REPLACEMENT/REPAIR	26 - WILDFLOWERS
12 - JACKED PIPE/PIPE REHAB	27 - PEDESTRIAN / BIKES
13 - MAINT REPLACEMENT	28- PAVEMENT MAINT. SCHEDULES (Selected for Limited Scope Maintenance Schedules Classified with Numeric Order Numbers)
14 - NEW ROADWAY	29- PAVEMENT MAINT. STAND ALONE (Selected for Larger Scope Maintenance Schedules Classified with Alpha-Numeric Order Numbers)
15 - PAVING / ASPHALT	

On Call Proposal: Field Removed

Proposal Item Total: Price generated from proposal total, no action required by user.

Control Group: The control group is the security designation which decides which user has access to which proposals(s). The data in this field may be changed in order to transfer the project to another control group.

Contract ID: A Contract's unique ID- should be identical to the Proposal ID.

Show Location button: No longer used.

Primary Fund Type: Required. Select the appropriate code from the drop-down menu.

PRIMARY FUND TYPE
BOND
FED – FEDERAL
OTH – OTHER
STA – STATE
TOLL

Proposal Status: Used by the Construction Division after Bid Letting only, leave blank.

Status Date (Award Date): Used by the Construction Division after Bid Letting only, leave blank.

Funding Source: Required Select the appropriate code from the drop-down menu.

FUNDING SOURCE
CM – CONSTRUCTION/MAINTENANCE
CONS-CONSTRUCTION
MANT-MAINTENANCE

Bridges: Required. Enter the number of bridges on the proposal. Enter 0 for no bridges.

OJT Goal: Used by the Construction Division, leave blank.

OJT Goal Units: Used by the Construction Division, leave blank.

OJT Goal Comments: Used by the Construction Division, leave blank.

Primary County: Required. This field will populate if Proposal was created from a project, otherwise select the appropriate code from the drop-down menu and should match iPM.

Primary District: Required. This field will populate if Proposal was created from a project, otherwise select the appropriate code from the drop-down menu and should match iPM. **Ensure the District selected includes the corresponding Residency.**

Document Specialist: As determined by Construction Division. Select from the pulldown menu.

Proposal Funding Total: A field used to enter amount to limit funding on a proposal. Used by the Construction Division, leave blank.

Mandatory Showing: Select the appropriate value. Y (YES) or N (NO)

NOTE: Select Y ONLY if the showing is mandatory. If not, then select N. You can still enter the showing location for non-mandatory showings.

Showing Location Code: No longer used.

Showing Date: As determined by Construction Division, leave blank.

Showing Time: As determined by Construction Division, leave blank.

Showing Location 1: Enter extra showing information in this field as needed.

Showing Location 2: Enter extra showing information in this field as needed.

Progress Schedule Category: Select the appropriate code from the drop-down menu.

Proposal to Doc Assembly: Used by the Construction Division, leave blank.

CTB Meeting Date: The actual date that the Transportation Board holds their meeting for award recommendation, used by Construction Division after Bid Letting only. Leave blank.

10.2 Changing a Proposal

From the Preconstruction Home screen select **Proposals**. This opens the Proposal Overview Screen. Enter a UPC number in the search box and click the Proposal ID to open the Proposal.

Home Previous My Pages Actions Help Log off

Proposal Overview

▼ Proposal Overview Save ?

Q 106872 Advanced Showing 1 of 1

0 changed

Proposal	Type	Descr
C0000106872B37		BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Click **Proposal ID** to open

Figure 3 – Proposal Overview Screen

This opens the Proposal on the General Tab where you can make edits to the fields. Note that changes cannot be made to the **Proposal ID** field as it is display-only. Once you have made edits, click the **Save** button to save changes. A Save complete message will display.

Home Previous My Pages Actions Help Log off

Overview Addenda Item Pricing Locations Proposal Vendors Sections and Items Wage Decisions

Proposal Summary Save Complete x

▼ Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save ?

Bid Letting:

General Projects Time Special Provisions Workflow

Proposal ID: C0000106872B37

Contract ID: C0000106872B37

Order Number: L22

Primary Fund Type*: FED - FEDERAL

Proposal Description*: BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Proposal Status: [Dropdown]

Location: FROM: 0.53 MI. S. OF RT 17 TO: 1.58 MI. N. OF RT 663

Status Date: [Calendar Icon]

Federal Project Number: STP-BR05(258)

Funding Source*: CONS - CONSTRUCTION

Figure 4 – Changing a Proposal

10.2.1 Adding Projects to a Proposal

When projects are added to a Proposal they act as a link to all the items in each project. The particular Projects, that are within a Proposal will become a construction contract, shall match the Projects that are attached to the Prime that the District submits to the Central Office Construction Division for advertisement and let.

To add projects to a Proposal perform the following steps.

1. Open the Proposal.
2. Click the **Projects** tab.
3. Click the **Select Projects** button. Opens a new window.
4. In the search box, enter the **UPC**.
5. **Click the projects** in the list, a green check box appears next to each selection.
6. Click the **Add to Proposal** button. This closes the Select Projects window.
7. Click the **Save** button on the blue component bar.

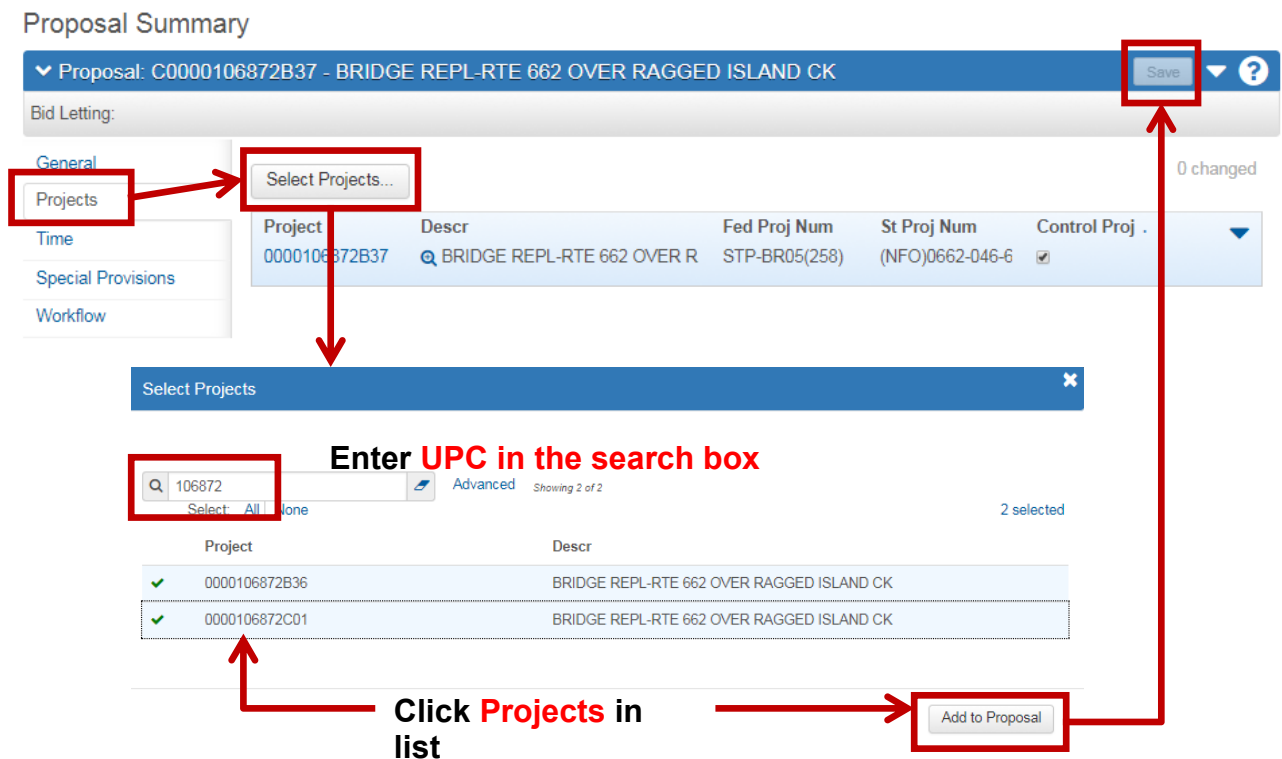


Figure 5 – Adding Projects to a Proposal

10.2.2 Removing Projects from a Proposal

To remove a project from the proposal, select the row actions button for the project in the list on the Projects Tab. Select **Remove** from the actions list. The project is removed and a message of Save Complete will be displayed.

Proposal Summary

▼ Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Save ▼ ?

Bid Letting:

General

Projects

Time

Special Provisions

Workflow

Select Projects...

0 changed

Project	Descr	Fed Proj Num	St Proj Num	Control Proj ..
0000106872B36	BRIDGE REPL-RTE 662 OVER R/	STP-BR05(258)	4150106872B36	
0000106872B37	BRIDGE REPL-RTE 662 OVER R/	STP-BR05(258)		
0000106872C01	BRIDGE REPL-RTE 662 OVER R/	STP-BR05(258)		

▼

Actions

Import Project Data

Remove

Tasks

Check Out Project To Estimator

Export Project To Estimator

Views

Figure 6 – Removing Projects from Proposal

10.3 Assigning Time Locations

Each proposal must have at least one time, numbered **00**, in order to specify time limits and liquidated damages in Site Manager.

Preconstruction allows three types of days (VDOT only uses one of these):

1. **Fixed Completion date (DT) - VDOT only uses Fixed Completion date (DT)**
2. Available days (AD) – Do not use
3. Calendar days (CD) – Cost Plus Time bidding information is also entered at the proposal time level but is only used for the calendar days. Do not use.

To add Time to a Proposal perform the following steps:

1. Open the Proposal
2. Click the **Time** tab.
3. Click the **New** button.
4. Fill in fields as described in the next section.
5. Click **Save**.

Proposal Summary

▼ Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Bid Letting:

General
Projects
Time
Special Provisions
Workflow

Search: Type search criteria or press Enter Advanced Showing 1 of 1

0 added | 0 marked for deletion | 0 changed

00 - JANUARY 1, 2030 Yes

Site Number * 00 **Always 00**

Completion Date 01/01/2030

Time Description * JANUARY 1, 2030 **Spell out the completion date**

Type Of Days * DT **Always DT**

Liquidated Damages Rate 0

Liquidated Damages Unit of Time Days

Number of Time Units

Time Unit

Road User Cost Per Time Unit

Maximum Time

Minimum Time

Main Proposal Time ☒ **Always Checked**

Save

Figure 7 – Adding Time to the Proposal (Fixed Completion Date)

Time Field Descriptions

Site Number: Required. This value will always equal **00**.

Time Description: Required. Write/Spell out the completion date to match the Completion Date Field.
Example: January 1, 2030

Type of Days: Required. From the drop-down menu, select either **DT** (Fixed Completion Date DT)

Number of Time Units: Not used. If CD was chosen for the Type of Days, this field becomes required.

Time Units: Not used. If CD was chosen for the Type of Days, this field becomes required. Hours or Days.

Main Proposal Time: Should always be checked

Completion Date: Enter the Completion Date in MM/DD/YYYY format or select the date from the calendar icon.

Liquidated Damages Rate: The amount to be charged, in whole dollars, for each time unit (hours or days) that a contractor exceeds the allowed time for a contract. If you enter a value in this field, you must also enter a value in the Liquidated Damages Unit of Time field. Default is 0.

Liquidated Damages Unit of Time: The time used for liquidated damages on a contract. Valid values are Hours or Days. Default is Days

Road User Cost Per Day: The field is used by Construction Division only. A value entered in this field indicates the Site is a Cost Plus Time Site. Enter the cost per day value (whole number; no dollar sign) to determine the low bidder in a Cost Plus Time bid. A value can only be entered in this field if the selection in the **Type of Days** field is CD. The value is the cost per day (dollar amount) of the inconvenience of the construction. Leave blank.

Maximum Time: A maximum amount of time a vendor may bid on this proposal. Leave blank. Leave blank.

Minimum Time: A minimum amount of time a vendor may bid on this proposal. Leave blank.

Special Provisions Tab: Not in use by VDOT.

10.4 Setting Proposal Workflow

A proposal's workflow is an important setting to move the proposal through the phases of the letting. *Workflow fields should never be left blank.* It's important to remember that you should never move the workflow backwards, they should only move forward in the list on the next page.

Click in the workflow field and select **VDOT WORKFLOW PROJECT-PROPOSAL-CONTRACT** and click in the WorkflowPhase field and select **PROPOSAL DEFINITION PHASE**. Once these are selected click the **Save** button.

NOTE: Once a project(s) is associated to a Proposal, the workflow setting in the Proposal controls the workflow of the projects.

Proposal Summary

▼ Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save ?

Bid Letting:

- General
- Projects
- Time
- Special Provisions
- Workflow**

Workflow

VDOT WORKFLOW PROJECT-PROPOSAL-CONTRACT

WorkflowPhase

PROPOSAL DEFINITION PHASE

Figure 8 – Proposal Workflow

Workflow Phase Definitions			
	WORKFLOW NAME	DESCRIPTION	NOTES
1	Project Definition Phase		Engineers/Designers Use
2	Proposal Definition Phase		Construction Division/District SAPP Coordinators
3A	Advertisement Phase	Locks Proposal/No changes from Projects	Any changes once the Proposal is Advertised must be added in the Addenda phase with proper notification to Document assembly group
3B	Addenda Phase	Changes only reflected when Addenda is open	Changes made during Advertisement.
4	Bid Letting Phase		Construction Division Use Only
5	Post Bid Evaluation Phase		Construction Division Use Only
6	Preconstruction has ended Phase		Construction Division Use Only
7	Moved to Construction/SiteManager	Passed to CLR/SiteManager	Construction Division Use Only
8	Historical Phase		Construction Division Use Only

ADMIN Role Only

10.5 Specifying Section and Line Numbers

When you create a proposal that consists of one or more project(s), sections need to be generated which assigns proposal line numbers, Preconstruction then combines the projects and project items in the following way:

- If you have selected the Combine With Like Items checkbox in the Project item, each item will appear once because Preconstruction combines them into single proposal line items, even if they are in different categories or projects. Bidders can then bid on a single item. In order for non-standard items to combine, the Description (Non-std) and Spec Book (Non-std) information must be exactly the same.
- If you have not selected the Combine With Like Items checkbox, that item will not be combined.
- Because bidders will not bid on non-bid items (you select the Non-Bid checkbox on the project item), non-bid items will be omitted from the proposal report.
- After Preconstruction combines like items, it assigns unique proposal line numbers, then updates every database item record to reflect the proposal line item number to which the record now belongs.

10.5.1 Add a Proposal Section

The Proposal Sections and Items component allows you to organize the items in the proposal into sections and to generate proposal line numbers. Each proposal must have at least one (1) section and they can be created manually or automatically. The Section number should always be 4 digits.

9.5.1.1 Generating Sections Automatically (Recommended Method)

When you generate proposal sections automatically, all of the proposal items are assigned to sections. You do not need to use the **Assign Items to Sections** command unless you want to review or make changes to the assignments. *If you add new items to one of the projects in the proposal after you automatically generate sections, you can use the **Auto Generate Sections** command again to assign the new items to a section.*

To Generate Sections Automatically perform the following steps:

1. Click the **Sections and Items** quick link.
2. Click the **Component Actions** button on the blue component bar.
3. Select **Auto Generate Sections**.
4. Section ID should be 0001 (4 digits).

The screenshot shows the 'Sections and Items' interface. At the top, there is a navigation bar with 'Home', 'Previous', and 'My Pages' buttons, and 'Actions', 'Help', and 'Log off' links. Below this is a breadcrumb trail: 'Overview > Addenda > Item Pricing > Locations > Proposal Vendors > Sections and Items > Wage Decisions'. The 'Sections and Items' link is highlighted with a red box. Below the breadcrumb, the 'Proposal Summary' section shows 'Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK'. A red arrow points from the 'Sections and Items' link to the 'Component Actions' button (a blue bar with a dropdown arrow) on the right. Another red arrow points from the dropdown arrow to the 'Auto Generate Sections' option in the actions menu. Below the actions menu, the 'Proposal Sections and Items' section shows a table with columns: 'Cat Alt Set ID', 'Cat Alt Member...', 'Total', 'Life Cycle Cost', and 'Total With Life Cyc...'. The table has one row with '0001' in the 'Section ID' field, 'BRIDGE BID ITEMS' in the 'Description' field, and '1,838,812.49' in the 'Total' field. A red box highlights the 'Section ID' field, and a red arrow points from the text 'Should always be 4 digits' to the field.

Should always be 4 digits

Figure 9 – Auto Generate Sections

10.5.1.2 Adding a Section Manually (Less Common Method)

Click the New button and fill in the fields Section ID with **0001** and a Description of **ALL BID ITEMS**, check the Base check box. Click the Save button. A Save Complete message will appear.

Proposal Sections and Items

▼ Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Save ▼ ?

1 added | 0 marked for deletion | 0 changed

Proposal Sections

Proposal Items

Proposal and Project Items

New

Cat Alt Set ID	Cat Alt Member...	Total	Life Cycle Cost	Total With Life Cyc...
Section ID * ▼	Description * ▼		Low Cost	Base ▼
0001	BRIDGE BID ITEMS			<input checked="" type="checkbox"/>

Figure 10 – Adding a Section Manually

10.5.2 Assigning Items to the Section

The next step is to Assign Items to the Section you just created. Click the Proposal Actions Button and select **Assign Items to Sections** from the list.

Proposal Sections and Items

▼ Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Save ▼ ?

Proposal Sections

Proposal Items

Proposal and Project Items

New

Cat Alt Set ID	Cat Alt Member...	Total
Section ID * ▼	Description * ▼	
0001	BRIDGE BID ITEMS	

Actions

There are no actions available.

Tasks

Assign Items to Sections

Auto Generate Sections

Generate Unique Project Line Numbers

Views

Attachments

Figure 11 – Assign Items to Sections

This will open the Assign Items to Sections page. You will have this screen for each project associated to the proposal. Be sure to assign all items and all categories for each project by selecting the drop down or the blue arrow buttons to page through the projects. To assign all project items to the section, select the **A** button beside All Project Items and click the **Save** button.

Note: the Assignment of items should always include all the categories (Bid and Non-bid). This allows the non-bid categories and items to appear on the Final Proposal detail estimate after bid letting.

Assign Items to Sections

▼ Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save ?

Projects 0000106872B36 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK 0 changed

1 of 3 ← →

All Project Items

0100 - BRIDGE BID ITEMS

Mixed None A
☐ ☐ ☒

Mixed None A
☐ ☐ ☒

Each Project has its own page,
Ensure all projects are assigned
to the Section

Sectio...	Description	Cat Alt ...	Cat Alt Mem...
(A) 0001	BRIDGE BID IT		

Figure 12 – Assign all Project Items to Section

10.6 Copying a Proposal

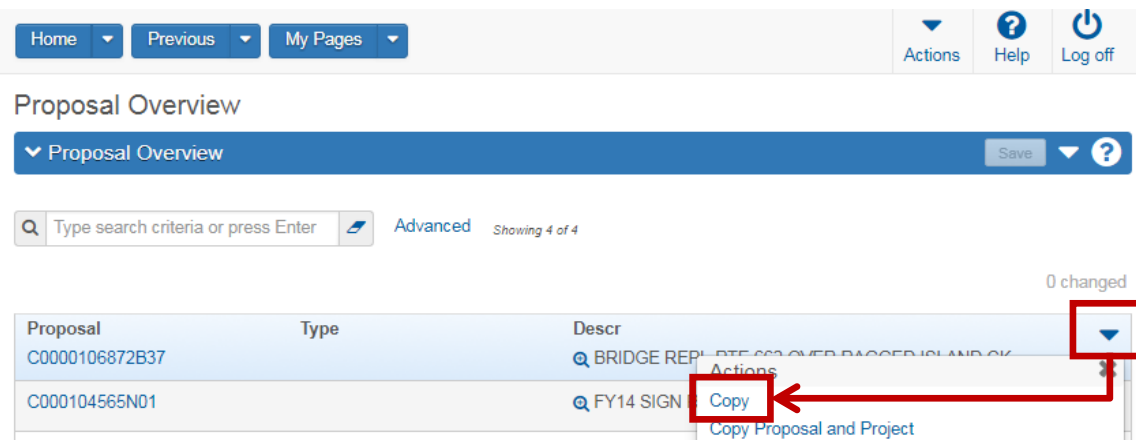
If you are setting up a new proposal that is similar to another proposal already saved in the database, you can copy the existing proposal and assign it a new proposal ID. You can then make any minor changes required for the new proposal. Preconstruction has two methods:

- Copy (no associated projects)
- Copy Proposal and Project

Note: Proposals/Projects that are Rejected and then re-advertisement shall be copied and a version letter is added to the end of the Project name, Proposal name and Contract ID. EG: C0000101289M01B

10.6.1 Copy a Proposal (no associated Projects)

To copy a proposal, find the proposal you wish to copy on the Proposal Overview Screen. Select the proposal row Actions menu and click **Copy** from the list.



Preconstruction displays the Copy Proposal window. Enter a new Proposal ID in the field. The Proposal ID cannot be the same as a Proposal that is already in the database.

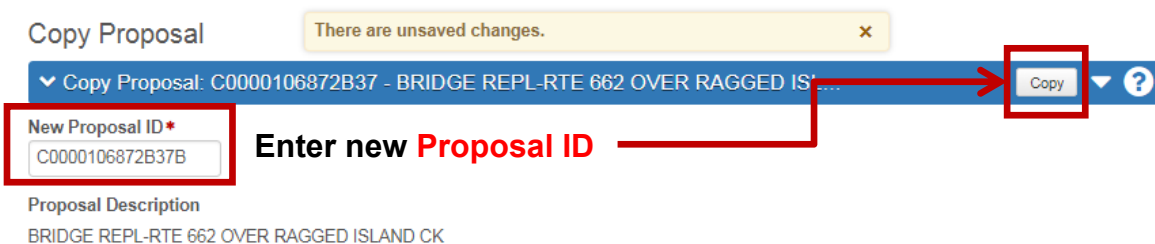


Figure 13 – Copy a Proposal

Click the **Copy** button once you have entered a new proposal ID. A Saved Complete message will display and you will be taken to the new proposal General Tab. Note that no projects are associated to the new proposal.

10.6.2 Copy Proposal and Project(s)

To copy a Proposal and Projects perform the following steps.

1. From the Proposal overview screen, enter the UPC in the search box.
2. Select the **row action button** of the Proposal you wish to copy.
3. Select **Copy Proposal and Project**.
4. Enter the new Proposal name in the **New Proposal ID** field.
5. Click the **Right arrow** to go to the next page.
6. Click all the **projects in the list** that you wish to include in the Proposal.
7. Click the **Right arrow** to go to the next page.
8. Enter the **New Project ID's** (same order from the previous screen)
9. Click the **Copy Proposal** button.

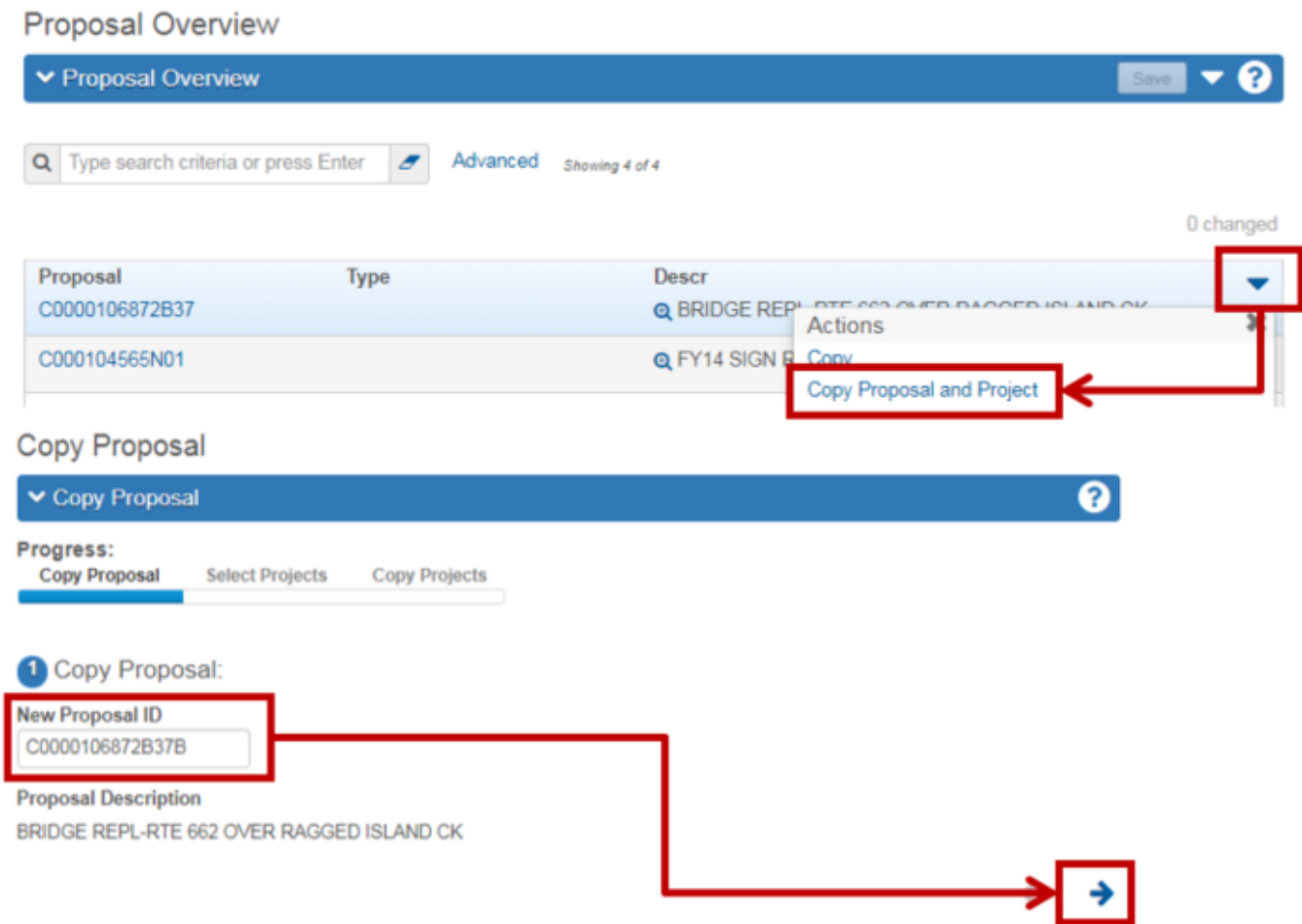


Figure 14 – Copy a Proposal and Project

Copy Proposal and Project(s) Continued

Copy Proposal

▼ Copy Proposal ?

Progress:

Copy Proposal **Select Projects** Copy Projects

2 Select Projects:

Click **Projects** in list

Q Type search criteria or press Enter Advanced Showing 3 of 3

Select All None 3 selected

Project	Descr	Type
✓ 0000106872B36	BRIDGE REPL-RTE 662 OVER RAGGEI	CR - CONSTRUCTION RAAP
✓ 0000106872B37	BRIDGE REPL-RTE 662 OVER RAGGEI	CR - CONSTRUCTION RAAP
✓ 0000106872C01	BRIDGE REPL-RTE 662 OVER RAGGEI	CR - CONSTRUCTION RAAP

← →

Copy Proposal

▼ Copy Proposal ?

Progress:

Copy Proposal **Select Projects** Copy Projects

3 Copy Projects:

Add **Project name(s)** in the same order from previous screen

0 changed

New Project ID*	Descr	Type
000106872B36B		
000106872B37B		
000106872C01B		

Copy Proposal

← →

Figure 15 – Copy a Proposal and Project

10.7 Deleting a Proposal

When the occasion to delete a proposal occurs, it is important to remember a proposal record contains several levels of associated information, deleting a proposal can have serious consequences. Projects are associated (linked) to a proposal and **Projects MUST BE REMOVED FROM THE PROPOSAL BEFORE DELETING THE PROPOSAL**. Please use Extreme Caution when deleting a Proposal!

There are two options to delete a Proposal

1. Delete Proposal
2. Delete Including Project

10.7.1 Delete a Proposal (with no Project(s) associated)

To delete a proposal, find the proposal you wish to delete on the Proposal Overview Screen. Select the proposal row Actions menu and click **DELETE** from the list. An additional screen appears, select **Delete only the Proposal**. Note: this process does not have an UNDO option so please **use caution when deleting!**

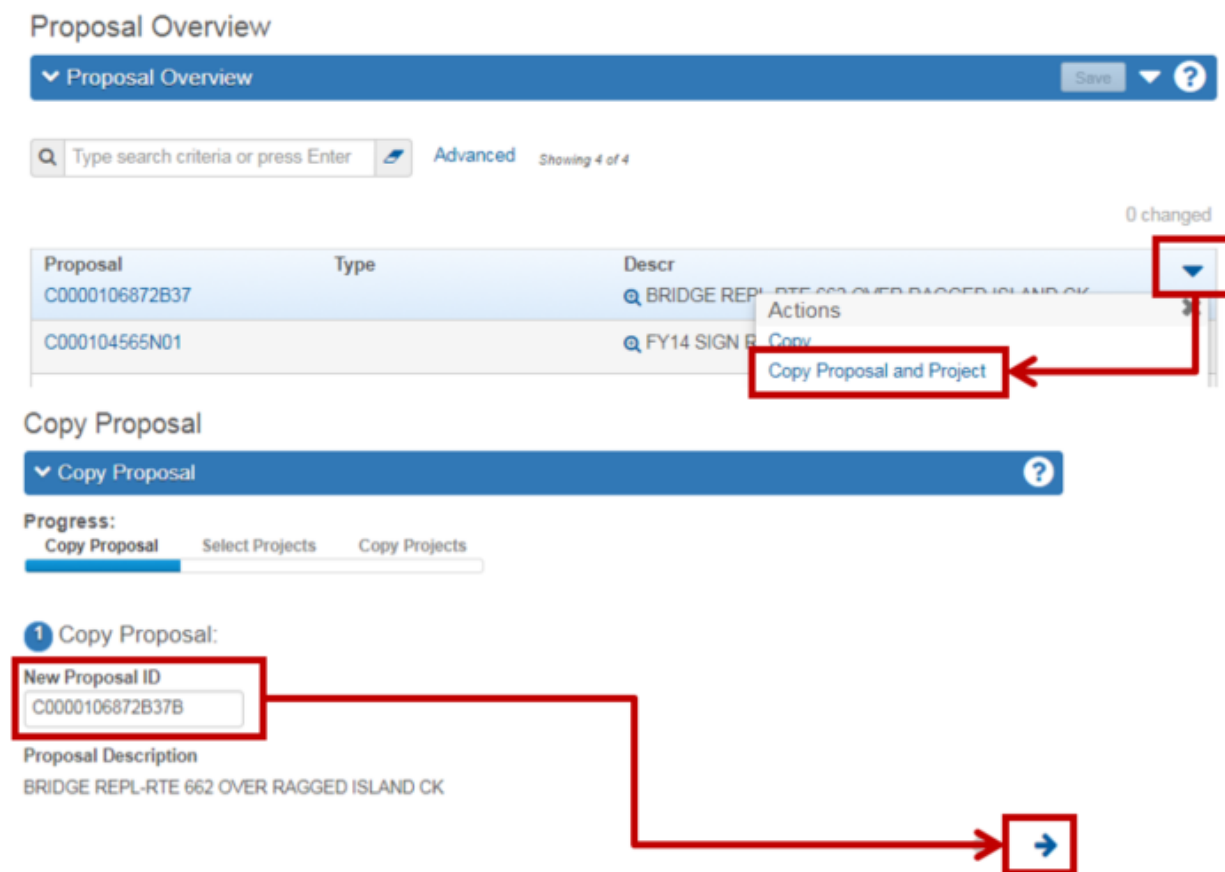


Figure 16 – Delete a Proposal

10.7.2 Delete a Proposal Including Project(s)

To delete a proposal, find the proposal you wish to delete on the Proposal Overview Screen. Select the proposal row Actions menu and click **Delete Including Projects** from the list. An additional screen appears, select **Delete only the Proposal**. Note: this process does not have an UNDO option so please **use caution when deleting!**

Proposal Overview

▼ Proposal Overview Save ?

Q Type search criteria or press Enter Advanced Showing 6 of 6 0 changed

C0000106872B37	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK	▼
C0000106872B37B	BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK	▼
C000104565N01	FY14 SIGN REPLACEMENT: I-77 BLAND AND WYTHE COUNT	▼
Proposal	Type	Descr
C00104565N01B		FY14 SIGN REPLACEMENT: I-77 BLAND AND WYTHE COUNT
RMRProposal001		roses proposal 001
TEST2007SPEC		TEST 2007 COOP

Actions

- Copy
- Copy Proposal and Project
- Delete...
- Exclude from Search Results

Proposal Power Delete

Delete only this proposal.

Delete Proposal

Delete this proposal and its projects.

Delete Including Projects

Caution!
Did you remove the **Projects**?
Once clicked, deletion occurs
There is no Undo

Figure 17 – Delete Proposal and its associated Projects

10.8 Generating Bid-Based Prices for Proposal

The Price Proposal Items component allows you to change the estimated unit price for any proposal item.

If you are on the Proposal General Tab, click the **Item Pricing** quick link at the top of the page.

This opens the Price Proposal Items screen where you can see all items that are associated to the proposal. You can click any Actions button to generate a price based on historical bids or you can manually change the price of a single item. You can also generate bid-based prices for all items in the proposal or all items in a section at once.

Home Previous My Pages Actions Help Log off

Overview Addenda Locations Proposal Proposal Vendors Sections And Items Wage Decisions

Price Proposal Items

Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save ?

Proposal Item Total
1,838,812.49

0 changed Expand All

Section ID	Description	Total	Proposal Items
0001	BRIDGE BID ITEMS	1,838,812.49	60

Prop Line Num	Item	Descr	Unit
0040	00120	REGULAR EXCAVATION	CY - CUBIC YARDS

Suppl Descr

Quantity Price Ext Amt

180.000

Cmts Src Price

Unknown

Price Item View Scatter Plot Views Attachments Links

Figure 18 – Price Proposal Items Screen

To manually change the price of a proposal item, click in the Price field, and type the new price. Notice that a lock is displayed in the Price field. **If the lock is closed you cannot change the price until you unlock the item and save the estimate.** When you modify a proposal item price and save your change, several updates take place:

- The system sets the Est Type field for that item to Ad Hoc.
- The new price, estimation type, and pricing comments are automatically updated in the associated project items.
- The extended amount is recalculated for the proposal item and the associated project items.
- The total price for the proposal is updated and for the associated projects.

Note: Once the Proposal has been advertised (and Proposal set to Advertisement phase) prices may only be changed with an Open addendum.

10.9 Generating the Proposal Price Schedule (aka Schedule of Items or SOI) Report

The Proposal Price Schedule report has the options to display the Proposal Cover Page, Schedule of Items, Proposal Estimate, DBE Interest Report, Fuel Sheet, Steel Sheet, Major Items, and Merge Data Sheet.

From the Proposal Overview Screen, search for your proposal. Click the row Actions button for the proposal and select **Proposal Price Schedule VDOT**.

The screenshot displays the 'Proposal Overview' screen. At the top, there are navigation buttons: 'Home', 'Previous', and 'My Pages'. To the right are 'Actions', 'Help', and 'Log off' buttons. Below the navigation bar, the 'Proposal Overview' section is active, showing a search bar with the text 'Type search criteria or press Enter' and a 'Save' button. A table lists proposals, with the first row highlighted. The table has columns for 'Proposal', 'Type', and 'Descr'. The first row contains the proposal ID 'C0000105893M01', an empty 'Type' field, and a description 'INT. IMPROVE AT RTE 17 (MILLS DRIVE) & RTE 609'. To the right of the table, a red box highlights the 'Actions' button (a downward arrow). A red line connects this button to the 'Actions' menu on the right. The 'Actions' menu is open, showing various options categorized into 'Tasks', 'Views', and 'Reports'. The 'Proposal Price Schedule VDOT' option is highlighted in the 'Reports' section. Other options include 'Copy', 'Delete', 'Exclude from Search Results', 'Check Out Proposal To Estimator', 'Export Proposal To Estimator', 'Generate Unique Project Line Numbers', 'Lock Proposal', 'Transition Proposal To Construction', 'Validate Proposal', 'Addenda', 'Locations', 'Attachments', 'Sections and Items', 'Fiscal Years', 'Tracked Issues', 'General', 'Vendor Bid Entry', 'Item Pricing', 'Vendors', 'Links', 'Wage Decisions', 'Additive Sections', 'Awarded Vendor Mailing Labels', 'Bid Letting Summary', 'Bid Tab Analysis VDOT', 'Bid Tab Edit', 'Contract Price Schedule VDOT', 'Final Proposal Detail Estimate VDOT', 'Fund Distribution', 'Major Items', 'Notice To Contractors', 'Planholder Mailing Labels', 'Preliminary Proposal Detail Est. VDOT', 'Proposal Addenda Detail VDOT', 'Proposal Fiscal Year Schedule', 'Proposed Advertisement (*)', 'Quantity Sheet Summary', and 'Vendor Invoices'. A 'Top of Page' link is at the bottom right of the menu.

Proposal	Type	Descr
C0000105893M01		INT. IMPROVE AT RTE 17 (MILLS DRIVE) & RTE 609

- Actions
- Copy
- Delete
- Exclude from Search Results
- Tasks
- Check Out Proposal To Estimator
- Export Proposal To Estimator
- Generate Unique Project Line Numbers
- Lock Proposal
- Transition Proposal To Construction
- Validate Proposal
- Views
- Addenda
- Locations
- Attachments
- Sections and Items
- Fiscal Years
- Tracked Issues
- General
- Vendor Bid Entry
- Item Pricing
- Vendors
- Links
- Wage Decisions
- Reports
- Additive Sections
- Awarded Vendor Mailing Labels
- Bid Letting Summary
- Bid Tab Analysis VDOT
- Bid Tab Edit
- Contract Price Schedule VDOT
- Final Proposal Detail Estimate VDOT
- Fund Distribution
- Major Items
- Notice To Contractors
- Planholder Mailing Labels
- Preliminary Proposal Detail Est. VDOT
- Proposal Addenda Detail VDOT
- Proposal Fiscal Year Schedule
- Proposal Price Schedule VDOT
- Proposed Advertisement (*)
- Quantity Sheet Summary
- Vendor Invoices

Figure 19 – Proposal Overview Screen

From the Generate Report menu, click the appropriate check boxes then click the **Execute** button.

Generate Report

Generate Report - Proposal Price Schedule VDOT

Settings Set Parameters 3 of 5

Show Proposal Cover Page *
Generate a cover page for the Price Schedule report.
☒

Show Schedule Of Items *
Generate schedule of items with no prices.
☒

Show Final Schedule Of Items *
Generate final schedule of items with no prices.
☒

Show Proposal Estimate *
Generate proposal estimate with estimated prices.
☒

Show DBE Interest Report *
Generate report of items for DBE interests.
☒

Show Fuel Sheet Report *
Generate report of fuel sheet items.
☒

Show Steel Sheet Report *
Generate report of steel sheet items.
☒

Show Major Items Report *
Generate report of major items.
☒

Show Merge Data Report *
Generate report of merge data.
☒

Execute

Figure 20 – Generate Proposal Price Schedule Screen

A new browser tab will open with the report and you can save the report as a pdf. Note that the report is not stored in the system. If you do not save the report before you close the browser, you will not be able to view it again unless you regenerate the report.


				Virginia Department of Transportation		Date Printed: 01/14/2015	
		Proposal Schedule of Items		Page 1 of 1			
Proposal ID: C0003409N01GKP		Oversight/State Project No.: (NFO)0666-011-P17-N501					
Order No.: S90		Federal Project No.: NONE					
Contractor:							
SECTION:		Not Assigned to a Section					
Cat Alt Set ID:		Cat Alt Mbr ID:					
Proposal Line Number	Spec No.	Item ID Description	Approximate Quantity and Units	Unit Price		Bid Amount	
				Dollars	Cents	Dollars	Cents
0010	513	00100 MOBILIZATION	LUMP SUM	LUMP SUM			
0020	ATTD	00122 GRADING NS GRADING	7,760.000 LF				
0030	308 309	10128 AGGR. BASE MATL. TY. I NO. 21B NO. 21B	3,200.000 TON				
0040	ATTD	10424 BLOTTED SEAL COAT TY. D TY. D	13,800.000 SY				
0050	315	16350 ASPHALT CONCRETE TY. SM-12.5A TY. SM-12.5A	460.000 TON				
Section:				Total:			
				Total Bid:			

Figure 21 – Price Proposal Schedule Screen

10.10 Assigning Wage Decisions

The Proposal Wage Decision Overview component provides access to all the wage decisions that are currently associated with the proposal. Wage decisions are not associated directly with the proposal, but rather with the projects in the proposal. To access the Proposal Wage Decision Overview component, click the Wage Decisions Quick link on the Proposal Summary component. Click the button Select Wage Decisions to assign wage decisions to the project. Search for the wage decision you will add to the project and then select it from the list. A green check will display beside the decision. Select Add to Project and then Save.

The screenshot shows the 'Proposal Wage Decision Overview' page. At the top, there's a navigation bar with 'Home', 'Previous', and 'My Pages' dropdowns, and 'Actions', 'Help', and 'Log off' buttons. Below this is a breadcrumb trail: 'Overview > Addenda > Item Pricing > Locations > Proposal Vendors > Sections and Items > Wage Decisions'. The 'Wage Decisions' link is highlighted with a red box and an arrow pointing down to the 'Select Wage Decisions' button. The 'Proposal Summary' section shows 'Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK' with a 'Save' button. The 'Proposal Wage Decision Overview' section shows 'Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK' with a 'Save' button. Below this is a 'Projects' dropdown showing '0000106872B36 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK'. The 'Project Work Type' is 'BN - BRIDGE NEW' and 'Local Funded' is 'False'. A red box highlights 'Federal Funded True' with an arrow pointing to the text 'If this is "Yes" Wage decisions must be added'. Below this is a table with columns: Name, Description, Percent, Primary. The table has one row: 'C046', 'ISLE OF WIGHT', '100.0000', 'Yes'. Below the table is a 'Select Wage Decisions...' button. A red box highlights this button with an arrow pointing to the 'Select Wage Decisions' modal. The modal has a search bar with 'isle of wight' and 'Advanced' search options. It shows a list of wage decisions with columns: Decision Num, Mod Num, Mod Descr, Publication Dt, Constr Type, Issuing Auth, Description. The table has 5 rows. The row 'VA129 (JAN-2017)' is selected, indicated by a green checkmark and a blue background. Below the table is a red arrow pointing to the text 'Click Current year in list' and another red arrow pointing to the 'Add to Project' button. The 'Add to Project' button is highlighted with a red box. Below the modal is a table with columns: Decision Num, Mod Descr, Publication Dt, Constr Type, Issuing Auth, Description. The table has one row: 'VA129 (JAN-2017)', 'NONE', '01/06/2017', 'HIGHWAY - HIGHWAY', 'Federal', 'CHESAPEAKE*, ISI'.

Home Previous My Pages Actions Help Log off

Overview Addenda Item Pricing Locations Proposal Vendors Sections and Items Wage Decisions

Proposal Summary

Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save

Proposal Wage Decision Overview

Proposal: C0000106872B37 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK Save

Projects 0000106872B36 - BRIDGE REPL-RTE 662 OVER RAGGED ISLAND CK

Project Work Type BN - BRIDGE NEW Local Funded False

Federal Funded True

If this is "Yes" Wage decisions must be added

Name	Description	Percent	Primary
C046	ISLE OF WIGHT	100.0000	Yes

Select Wage Decisions...

0 marked for deletion | 0 changed

Select Wage Decisions

Q isle of wight Advanced Showing 5 of 5

Select: All None 1 selected

Decision Num	Mod Num	Mod Descr	Publication Dt	Constr Type	Issuing Auth	Description
VA129 (2015-NEW)	0	NONE	01/02/2015	HIGHWAY - HIGHV	Federal	CHESAPEAKE
VA129 (JAN-2016)	0	NONE	01/08/2016	HIGHWAY - HIGHV	Federal	CHESAPEAKE
✓ VA129 (JAN-2017)	0	NONE	01/06/2017	HIGHWAY - HIGHV	Federal	CHESAPEAKE
VA129 (JAN2015)	0	NONE	01/02/2015	HIGHWAY - HIGHV	Federal	CHESAPEAKE
VA140-2013 (VA13)	0	0	09/20/2013	HIGHWAY - HIGHV	Federal	COUNTIES:

Click Current year in list

Add to Project

Decision Num	Mod Descr	Publication Dt	Constr Type	Issuing Auth	Description
VA129 (JAN-2017)	Q NONE	01/06/2017	HIGHWAY - HIGHWAY	Federal	Q CHESAPEAKE*, ISI

Figure 22– Proposal Wage Decision Overview

10.11 Proposal Addendums

After a proposal has been advertised, subsequent changes to proposal information that affect contractor bidding (such as proposal times, items, or special provisions) must be tracked and distributed (revisions are posted to CADD/Bid-X) to the proposal vendors (Contractors) to make them aware of the changes from the original advertisement. Once a proposal Workflow has been set to Advertisement phase, the system locks the proposal from updating from the project(s) level.

This is accomplished by adding addenda to the proposal. Before you can add an addendum to a proposal, the proposal must be changed to the Addenda Workflow phase.

WORD OF CAUTION: Do not Auto Generate Sections while in an Open Addendum!!

From the Proposal **General Tab**, select the **Addenda** quick link. This opens the Addendum Summary page. Select the New button and complete the **Description** and **Comments** fields. Click the **Save** button. This automatically opens the newly created addendum.

Home Previous My Pages Actions Help Log off

Overview Addenda Item Pricing Locations Proposal Vendors Sections and Items Wage Decisions

Proposal Summary

▼ Proposal: C000105131C01 - INTERSECTION IMPROVEMENTS AT RTE 645 AND RTE 144 Save ?

Bid Letting: 171025

General Projects Time Special Provisions Workflow

In Addenda phase, no Addendum is open.

Workflow VDOT PROJECT-PROPOSAL-CONTRACT

WorkflowPhase ADDENDA PHASE

Figure 23 – Addendum Summary Screen

10.11.1 Adding Items in Addendum Phase

If you wish to add an item, you must determine the appropriate **Proposal Item Line Number** so that the new item is inserted (numerically by the item code number) in the correct line on the Proposal Price Schedule (aka Schedule of Items or SOI).

This is accomplished by using the Proposal Price Schedule report to find the correct Proposal line number. Here is an example:

Virginia Department of Transportation

Schedule of Items

Date Printed: 11/12/2015

Page: 4

Proposal ID: C00052050C01B

Oversight/State Project No.: (NFO)U000-306-102, C501, B601

Order No.: H62

Federal Project No.: STP-5306(005)

Contractor: _____

SECTION: 001

ALL PROJECT ITEMS

Cat Alt Set ID: _____

Cat Alt Mbr ID: _____

Proposal Line Number	Spec No.	Item ID Description	Approximate Quantity and Units	Unit Price		Bid Amount	
				Dollars	Cents	Dollars	Cents
0270	ATTD	14300 CEMENT CONCRETE SIDEWALK 4"	146.000 SY				
0280	ATTD	14440 SAW CUT SIDEWALK	14.000 LF				
0285		16330 ASPHALT CONC SM 9.0A	4 TONS				
0290	507	23560 TEMP. SAFETY FENCE 4'	200.000 LF				
0300	511	24100 ALLAYING DUST	400.000 HR				
0310	512	24152 TYPE III BARRICADE 8'	9.000 EA				
0320	512	24160 CONSTRUCTION SIGNS	385.000 SF				
0330	512	24278 GROUP 2 CHANNELIZING DEVICES	2,079.000 DAY				

Figure 24 – Adding Items after Advertisement

Step 1: To add a new item, open the appropriate project within the Proposal, click the Project Categories and Items tab, click the Items tab then click the **New** button. Enter all the required fields, including the Proposal Item Line Number field. Click Save. Please don't forget to assign the new item to a funding package by selecting the Funding: Assign to items quick link.

Step 2: The new item(s) must be added to an existing fund package within the project. See Chapter 6 (section 6.2.2) for details.

Step 3: Assign the new item(s) to the Proposal section. Otherwise they will not appear on the Proposal detail estimate report. See Section 9.6.1.3

The screenshot shows a web-based form for adding project items. At the top, there is a header bar with a search icon, the value '110.00000', '0.00', and a red 'X' icon. Below the header, the item details are displayed: '285', '110.00000', '4.000', and '16330 - ASPHALT CONCRETE TY. SM-9.0A TON'. The main form area is divided into two columns. The left column contains fields for 'Item Number' (with a search icon and the value '16330'), 'Project Item Supp Description' (with a search icon), 'Spec Book# Non-Std' (with a search icon), 'Unit of Measure' (with the value 'TON'), 'Quantity' (with the value '4.000'), 'Estimated Unit Price' (with the value '110.00000'), 'Extended Amount' (with the value '0.00'), and 'Price Lock Flag' (with a checkbox). The right column contains fields for 'Category ID' (with the value '0100 - REGULAR BID ITEMS'), 'Project Item Previous Price' (with a search icon), 'Non-Bid' (with a checkbox), 'Combine With Like Items' (with a checked checkbox), 'Item Alternate Set ID' (with a search icon), 'Alternate Member ID' (with a search icon), 'Source Of Price' (with the value 'Ad Hoc'), 'Proposal Item Line Number' (with the value '0285' and a red box around it), and 'Pricing Comments' (with a search icon).

Figure 25 – Adding Project Items Screen

Step 4: Close and Approve the Addendum

Once you have completed all the necessary corrections, the next step is to Close and then Approve the Addendum.

The image displays three sequential screenshots of the 'Addendum Summary' page in a web application, illustrating the process of closing and approving an addendum. A red line connects the 'Close' button in the first screenshot to the 'Closed Dt' field in the second, and then to the 'Approved Dt' field in the third.

First Screenshot: The page title is 'Proposal: C00052050C01B - 0.040 MI. GRADE & DRAIN, CURB & G...'. A message box states 'In Addenda phase, for Addendum 1'. The 'Actions' menu is open, showing 'Approve' and 'Close' options. A red box highlights 'Step 2 - Approve' and another red box highlights 'Step 1 - Close'. The 'Add Num:' is 1, 'Created Dt:' is 11/12/2015, and 'Description:' is 'ADDENDUM 1'. The 'Comments:' field contains 'ADD ITEM 16330'.

Second Screenshot: The page title is 'Proposal: C00052050C01B - 0.040 MI. GRADE & DRAIN, CURB & GUTTER...'. A green message box states 'Addendum Successfully Closed'. A message box states 'In Addenda phase, no Addendum is open.'. The 'Closed Dt:' field is highlighted with a red box and contains the date 11/12/2015. The 'Add Num:' is 1, 'Created Dt:' is 11/12/2015, and 'Description:' is 'ADDENDUM 1'. The 'Comments:' field contains 'ADD ITEM 16330'.

Third Screenshot: The page title is 'Proposal: C00052050C01B - 0.040 MI. GRADE & DRAIN, CURB & GUTTER...'. A green message box states 'Addendum Successfully Approved'. A message box states 'In Addenda phase, no Addendum is open.'. The 'Approved Dt:' field is highlighted with a red box and contains the date 11/12/2015. The 'Add Num:' is 1, 'Created Dt:' is 11/12/2015, and 'Description:' is 'ADDENDUM 1'. The 'Comments:' field contains 'ADD ITEM 16330'.

10.12 Lessons Learned – Common Proposal Errors

10.12.1 Ensure these items are in the correct Category, marked as non-bid and have a quantity of 1.

- Category **3001- CEI Lump Sum** → Use item code **25580 Construction Engineering**
Category **3002- Contract Requirements** → Use item code **25585 Contract Requirements**
Category **3003- Contingency Lump Sum** → Use item code **25590 Contingency**

Excerpt from Chapter 4 of this manual

Categories are identified with a **four-digit number (this is required)** and fall in **two distinct types**:

1. **Bid Category** (items the contractor will bid/build) or
2. **Non-Bid Category** (overhead costs VDOT incurs that the contractor does not bid/use).

The following Category numbering scheme IS REQUIRED for Categories:

- **REGULAR BID Category numbers 0001 - 1999** Ex: 0100, 0150, 0200, 0300, 0400, etc.

Examples:

Road Design, Traffic

or Bridge Project

Utility Project Example:

0001 - REGULAR BID ITEMS

0100 - WATER

0200 - SEWER

- **NON-BID Category number 2000 - 2999** Work performed by State Forces

Examples: Police Patrol, State Force work,

Utility Inspector, Railway

2000 - STATE FORCES

- **NON-BID Category numbers 3001 – 3003**

Construction Eng (CEI) Lump Sum: **3001**

3001 - CEI LUMP SUM

Contract Requirements: **3002**

(Use Incentives/Disincentives here)

3002 - CONTRACT REQUIREMENTS

3002 - INCENTIVES/DISINCENTIVES

Contingency Lump Sum: **3003**

3003 - CONTINGENCY LUMP SUM

10.12.1 Check to make sure there are no non-bid items in the regular bid items category. Preliminary Project Detail Estimate Report will generate an error if a TEC item is in a regular bid item category

Project ID: 00097160C01	UPC: 97160	FHWA 534: 4H011
Project Description: REPLACE BRIDGE OVER SWIFT CREEK		
Category: 0100	REGULAR BID ITEMS	
Federal Structure ID:	Road Segment Length: 12.1234 MI	Road Segment Width: 22.0000 FT
Bridge Plan No.: BR001	Num of Spans: 2	Bridge Length: 2.5200 MI
FHWA Type Code: 04	04-4R - RECONSTRUCTION-NO ADDED CAP	
Activity Code: 631	631 CONTRACT CONSTR - REGULAR - FED	
Fed Construction Class:		

Line No.	Item Code	Spec Number	Item Description	Alt Set ID	Alt Mem ID	Units	Estimated Qty	Unit Price	Amount	Fund Package ID	Flags*
0010	00100	513	ERROR ** Non-Bid item in a regular Bid category ** ERROR			TEC	1.000	66,373.72500	66,373.73	100	L B
0020	00101	517	CONSTRUCTION SURVEYING (CONSTRUCTION)			LS	1.000	11,025.56488	11,025.56	100	L B
0030	00110	301	CLEARING AND GRUBBING			ACRE	1.000	62,328.54271	62,328.54	100	L B
0040	00155	303	GEOTEXTILE (EMBANKMENT STABILIZATION)			SY	1,185.000	1.57000	1,860.45	100	L
0050	00700	302	POST INSTALLATION INSPECTION			LF	20.000	10.00000	200.00	100	L
0060	01156	302	STORM SEWER PIPE 15"			LF	20.000	62.71000	1,254.20	100	L
0070	01180	302	18" PIPE			LF	72.000	41.77000	3,007.44	100	L
0080	06150	302	15" END SECTION ES-1 OR 2			EA	4.000	448.78000	1,795.12	100	L
0090	06745	302	DROP INLET DI-2A			EA	4.000	2,605.99000	10,423.96	100	L
0100	09150	414	EROSION CONTROL STONE CLASS I, EC-1			TON	10.000	79.94170	799.42	100	L
0110	10128	308 309	AGGR. BASE MATL. TY. I NO. 21B			TON	1,198.000	22.35971	26,786.93	100	L
0120	10250	ATTD 1234	NS AGGR. MATERIAL AGGR. MATERIAL NO. 10 STONE 308			TON	288.000	35.00000	10,080.00	100	L
0130	10250	ATTD	NS AGGR. MATERIAL AGGR. MATERIAL NO. 3 STONE 308			TON	768.000	30.00149	23,041.14	100	L

10.12.2 Check is to ensure there are no "N" flags column in the Preliminary Project Detail Estimate Report.

Line No.	Item Code	Spec Number	Item Description	Alt Set ID	Alt Mem ID	Units	Estimated Qty	Unit Price	Amount	Fund Package ID	Flags*
0010	00100	513	MOBILIZATION			LS	1.000	15,000.00000	15,000.00		L B
0020	00101	517	CONSTRUCTION SURVEYING (CONSTRUCTION)			LS	1.000	12,000.00000	12,000.00		L B
0030	00110	301	CLEARING AND GRUBBING			LS	1.000	10,000.00000	10,000.00		L B
0040	00211	303	MINOR STRUCTURE EXCAV. PIPE CULVERT			CY	1,500.000	21.00000	31,500.00		N L
0050	10123	308 309	AGGR. BASE MATL. TY. I NO. 21A			TON	1,000.000	100.00000	100,000.00		L
0060	14502	ATTD	REINFORCING STEEL			LB	12,000.000	2.12000	25,440.00		L
0070	16350	315	ASPHALT CONCRETE TY. SM-12.5A			TON	244.000	123.03000	30,019.32		L

Category Total: \$223,959.32

Project Total: \$223,959.32

* Flags: (F)ixed Price, (N)on Bid, (L)ow Cost Contributor, (B)id as Lump Sum

10.12.4 Ensure all items are assigned to the Proposal Section

Home Recent My Pages Actions Help Log off

Overview Item Pricing Locations Proposal Proposal Vendors Sections and Items Wage Decisions

Assign Items to Sections

Proposal: C00093225C01D - 0.311 MI. GRADE, DRAIN, ASPH. PAVE. SIGNAL & UTILITIES Save

Projects: 000093225C01D - INTERSECTION IMPROVEMENT 1 of 2 0 changed

All Project Items	Mixed	None	A
0100 - REGULAR BID ITEMS	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
0520 - UTILITIES	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2001 - STATE POLICE	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3001 - CONSTRUCTION ENGINEERING	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3002 - CONTRACT REQUIREMENTS	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Section ID: 001 Description: ALL PROJECT ITEMS Cat Alt Set ID: Cat Alt Member ID:

Error – All “A”s Should be filled in

The Auto Generate Sections button will automatically create a section for each category on the projects. *Multiple sections should only be used when creating a proposal with Additives and/or Alternates.*

10.12.5 Ensure all projects associated to the prime are associated to the proposal and name the Proposal after the controlling project.

Prime Project: C00105588N01 - FR: HAMPTON BLVD TO: RUTHVEN ROAD Save

General Select Projects 0 changed

Projects

Project: 0000105588N04	Descr: RECONSTRUCTION/IMPROVEMENTS TO THE EXISTING ROADWAY TO IMPROVE THE STRUCTURAL INTEGRITY	Itm Code Tbl: 07 - 2007	Unit Sys: English
Control Proj: Yes	Fed Proj Num: NHPP-5A03(736)	St Proj Num: (NFO)0406-122-R22.N501	
0000106843N04	RECONSTRUCTION/IMPROVEMENTS TO THE EXISTING ROADWAY TO IMPROVE THE STRUCTURAL INTEGRITY.	07 - 2007	English
No	STP-PM05(402)	(NFO)0406-122-R22, N501	

Workflow

10.12.6 To fix unit prices displaying on the Schedule of Items (SOI)

You will have to select the Project item from the Categories and Items link and remove the Bid requirement code and replace it with a null value.

Virginia Department of Transportation

Date Printed: 09/15/2015

Schedule of Items

Page: 2

Proposal ID: CM0000107633C01 Oversight/State Project No.: (NFO) BRDG-966-278, C501
Order No.: I52 Federal Project No.: BR-BR06(265)

Contractor:

SECTION: 0001

ALL PROJECT ITEMS

Cat Alt Set ID:

Cat Alt Mbr ID:

Proposal Line Number	Spec No.	Item ID Description	Approximate Quantity and Units	Unit Price		Bid Amount	
				Dollars	Cents	Dollars	Cents
0010	ATTD.	00098 MOBILIZATION SITE MOBILIZATION	14.000 EA	6,500.00000		91,000.00	
0020	303	00120 REGULAR EXCAVATION	50.000 CY				

6,500.00000

14.000

91,000.00

0010

00098 - NS MOBILIZATION

SITE MOBILIZATION

Item Number: *

00098

NS MOBILIZATION

Category ID: *

0100 - BRIDGE ITEMS

Project Item Supp Description:

SITE MOBILIZATION

Project Item Previous Price:

Non-Bid:

☐

Combine With Like Items:

☐

Spec Book# Non-Std:

ATTD.

Unit of Measure:

EA - EACH

Item Alternate Set ID:

Quantity:

14.000

Alternate Member ID:

Estimated Unit Price:

6,500.00000

Source Of Price:

Ad Hoc

Extended Amount:

91,000.00

Proposal Item Line Number:

0010

Price Lock Flag:

☐

Pricing Comments:

Low Cost Flag:

Yes

Supplemental Description Required:

Yes

Bid Requirement Code:

Fixed

Fixed

Maximum

Minimum

Unit Price Comparison:

Bid Requirement code field should be blank

10.12.7 Make sure the Project has a Road Segment with a Route and Road System.

No road segment creates issues with the Ballot report.

STP-5204 (118)
Primary

U - URBAN
101

Name: ▼
STP-5204 (118)
Up to 60 characters

Road Section Number: ▼
101

Description: * ▼
Primary

Lane Mile: ▼

Length: ▼

Width: ▼

Applied Depth: ▼

Road System: * ▼
U - URBAN ▼

Route: * ▼
0229

Begin Station: ▼
155+00.79

End Station: ▼
197+73.14

Category ID: ▼

APPENDIX A – PROJECT ID (PCN) NUMBER

The format of the Project ID for various types of projects is as follows:

A.1 Projects with UPC Numbers

The **13-character Project ID (PCN)** is composed of the following:

<u>Position</u>	<u>Explanation</u>
1-10	= UPC (iPM) Number, with leading zeroes
11	= Type of Project: (LETTER MUST BE CAPITALIZED) B – Bridge C – L&D (Construction or Road designs) D – Drainage Structures over 20' in length H – Hydraulics L – Environmental R – Right of Way S – SAAP (Special Advertisement and Award Process) T – Traffic Engineering U – Utilities X – Maintenance (Regular Project using Maintenance Funds) N – No Plan M – Minimum Plan
12-13	= For Constr., Bridge, etc. The last two digits of the fourth part of the state project number, following the C, B, R, etc. (Ex: for C503 project, enter 03 in positions 12 & 13 for B622 project, enter 22 in positions 12 & 13)

EXAMPLES of Project ID (PCN):

0000008216C01 (C501 project for UPC# 8216)
0000015492B01 (B601 project for UPC# 15492)
0000010679N01 (N501 project for UPC # 10679)
0000106515R01 (R201 project for UPC# 106515)
0000100625M01 (M501 project for UPC# 100625)
0000108104D44 (D644 project for UPC# 108104)
0000108897S01 (N501 project for UPC# 108897)

Note: all Letters in these ID's are CAPITALIZED !

A.2 Maintenance Projects

The 13-character Project ID is composed of the following:

<u>Position</u>	<u>Explanation</u>
1	= M (for Maintenance-funded)
2	= 1 – Bristol 2 – Salem 3 – Lynchburg 4 – Richmond 5 – Hampton Roads 6 – Fredericksburg 7 – Culpeper 8 – Staunton 9 – Northern Virginia
3-4	= Year EX. 16 or 17
5-6	= Project Type = (LETTER MUST BE CAPITALIZED) ST – Surface Treatment SS – Slurry Seal LM – Latex Modified PM – Plant Mix
7	= Schedule Letter – A, B, C, etc. (LETTER MUST BE CAPITALIZED)
8-13	= 6 Digit Unique UPC

A unique UPC is set up for each county, for each system. The District Maintenance Engineer will assist in determining the Project ID for your project.

Examples of Project ID for Maintenance Projects:

CM218STA111166
SS8A800111612
M0M117SS110871
LM8C800110684
M615LMA107318
M115PMD106385
M415SSA107434
M215STA107156

Note: all letters must be CAPITALIZED !

A.3 District Originated or Urban Projects (Non-IPM Projects)

The 13-character Project ID is composed of the following:

<u>Position</u>	<u>Explanation</u>
1-2	= BR – Bristol SA – Salem LY – Lynchburg RC – Richmond SU – Hampton Roads FR – Fredericksburg CU – Culpeper ST – Staunton NV – Northern Virginia UR – Urban
3-13	= Assigned by Districts or Local Assistance Division

A.4 Prime Project ID and Proposal & Contract ID

Both the Prime Project ID and the Proposal/Contract ID begin with a C and end with the Project ID of the largest project. The Proposal ID and Contract ID should always be the same. The Prime and the Proposal/Contract ID are typically 14 digits.

Example 1: **Projects ID's** are: 0000003942C01
0000003942B01
0000003942B02

Prime Project = C00000003942C01
Proposal/Contract ID = C00000003942C01

Note: all letters must be CAPITALIZED !

Example 2: **Project ID** is: M615LMA107318

Prime Project = CM615LMA0107318
Proposal/Contract ID = CM615LMA0107318

Note: The C is added to the Project ID, it does not replace the first digit.

Note: all letters must be CAPITALIZED !

APPENDIX B – ITEM CODE INDEX

<u>GRADING ITEMS</u>	00001-00499
Mobilization, Earthwork, Concrete Masonry, Clearing & Grubbing, Excavation, Select Material	
<u>DRAINAGE ITEMS</u>	00500-09999
Water Service Lines (Private), Pipe, Concrete, Drop Inlet, Manhole, Paved Ditch, Bedding Material, Reinforcing and Structural Steel, Remove Existing Structure	
<u>PAVEMENT ITEMS</u>	10000-11999
Portland Cement, Calcium Chloride, Sodium Chloride, Base Course Concrete and Reinforcing Steel for Bridge Approach Slabs	
<u>INCIDENTAL ITEMS (Permanent)</u>	12000-13999
Curb & Gutter, Cattle Guard, R/W Monument, Sidewalk, Guardrail, Median Barrier, Retaining Wall, Median Strip, Fence	
<u>MAINTENANCE SCHEDULE ITEMS</u>	14000-19999
Schedule Work, Plant Mix, Service Treatment, Guardrail, Fence, Slurry Seal, Cold Mix	
<u>PROTECTIVE ITEMS (Temporary)</u>	20000-25999
Allaying Dust, Maintenance of Traffic, Demolition of Pavement, Obscuring Old Road, Field Office, Plant Lab, Linseed Oil Treatment	
<u>EROSION CONTROL</u>	26000-27999
Riprap, Bedding Material, Topsoil, Seeding, Mowing	
<u>PLANTING ITEMS</u>	28000-39999
<u>UTILITY ITEMS WATERMAIN</u>	40000-41999
<u>SANITARY SEWER</u>	42000-49999
<u>TRAFFIC CONTROL & SAFETY ITEMS</u>	
TRAFFIC SIGNS	50000-50999
TRAFFIC SIGNALIZATION	51000-53999
PAVEMENT MARKING ITEMS	54000-54999
LIGHTING ITEMS	55000-59999
<u>BRIDGE ITEMS</u>	
BRIDGE SUPERSTRUCTURE	60000-63999
BRIDGE SUBSTRUCTURE	64000-66999
BRIDGE INCIDENTALS	67000-67999
<u>STRUCTURAL WIDENING OR REPAIR</u>	
SUPERSTRUCTURE	68000-68999
SUBSTRUCTURE	69000-69999
<u>RIGHT OF WAY ITEMS</u>	70000-72000
<u>CONTRACT ADJUSTMENTS (RESTRICTED TO POST-AWARD ONLY)</u>	80000-99999

Common Item Codes:

LUMP SUM CONSTRUCTION ENGINEERING	25580
Must be used in Category 3001 only	
LUMP SUM CONTRACT REQUIREMENTS	25585
Must be used in Category 3002 only	
LUMP SUM CONTRACT CONTINGENCY	25590
Must be used in Category 3003	

APPENDIX C –COUNTY - DISTRICT - RESIDENCY CONVERSION CHART

See Chapter-1C of the Road Design Manual

<http://www.virginiadot.org/business/locdes/rdmanual-index.asp>

APPENDIX D – CONVERSION CHART (CITY)

See Chapter-1C of the Road Design Manual

<http://www.virginiadot.org/business/locdes/rdmanual-index.asp>

APPENDIX E – PROJECT WORK TYPES

CODE **DESCRIPTION**

BDO	BRIDGE DECK OVERLAY
BDR	BRIDGE DECK REPLACEMENT
BN	BRIDGE NEW
BWR	BRIDGE WIDENING & REPAIR
CBC	CONSTRUCTION NEW BOX CULVERT
CDA	CONSTRUCTION DEMOLITION/ABATEMENT
CITS	CONSTRUCTION DEMOLITION/ABATEMENT
CNA	CONSTRUCTION NEW ALIGNMENT
CTL	CONSTRUCTION NEW TURN LANES
CUE	CONSTRUCTION UPGRADE EXISTING LANES
CW	CONSTRUCTION WIDENING (ADDING LANES)
CWM	CONSTRUCTION WETLAND MITIGATION/LANDSCAP
MAR	MAINT ASPHALT PLANT MIX RESURFACING
MBD	MAINTENANCE BR SUPERST REPAIR/ REHAB
MBSB	MAINTENANCE BR SUBSTRUCTURE REPAIR/REHAB
MG	MAINTENANCE GUARDRAIL
MPAR	MAINTENANCE PAVEMENT REPAIRS
MPIR	MAINTENANCE PIPE REHABILITATION
MPM	MAINTENANCE PAVEMENT MARKING
MRWF	MAINTENANCE RIGHT OF WAY FENCING
MSCG	MAINTENANCE SIDEWALK/CURB & GUTTER
MSIG	MAINTENANCE SIGNAGE
MSIN	MAINTENANCE SIGNALS
MSR	MAINTENANCE SLOPE REPAIR
MSS	MAINTENANCE SLURRY SEAL
MST	MAINTENANCE SURFACE TREATMENT

APPENDIX F – FHWA Type Codes

CODE	NAME
01	NEW CONSTRUCTION ROADWAY
03	4R - RECONSTRUCTION- ADDED CAPACITY
04	4R - RECONSTRUCTION-NO ADDED CAPACITY
05	4R - SYSTEM PRESERVATION - RESURFAC
06	4R - RESTORATION & REHABILITATION
07	4R - RELOCATION
08	BRIDGE - NEW CONSTRUCTION
10	BRIDGE - REPLACEMENT-ADDED CAPACITY
11	BRIDGE - REPLACE-NO ADDED CAPACITY
13	BRIDGE - REHAB-ADDED CAPACITY
14	BRIDGE-REHAB-NO ADDED CAPACITY
15	PRELIMINARY ENGINEERING
16	RIGHT OF WAY
17	CONSTRUCTION ENGINEERING
18	PLANNING
19	RESEARCH
20	ENVIRONMENTAL ONLY
21	SAFETY
22	SAFETY - RAIL/HWY CROSSING
23	TRANSIT
24	TRAFFIC MANAGEMENT/ENGINEERING-HOV
25	VEHICLE WEIGHT ENFORCEMENT PROGRAM
26	FERRY BOATS
27	ADMINISTRATION
28	OTHER-FACILITIES FOR PEDS/BIKES
29	OTHER-ACQUISITION OF SCENIC/HISTORY
30	OTHER-SCENIC OR HISTORIC HWY PROGRAM
31	OTHER-LANDSCAPE/SCENIC BEAUTIFY
32	OTHER-HISTORIC PRESERVATION
33	OTHER-REHAB/OPER OF HISTORIC BLDG
34	OTHER-PRESERVATION OF ABANDONED RWY
35	OTHER-CTRL/REMOVAL OUTDOOR ADVERTISE
36	OTHER-ARCHAEOLOGICAL PLAN/RESEARCH
37	OTHER-MITIGATION OF WATER POLLUTION
38	OTHER-SAFETY AND ED FOR PED/BIKE
39	OTHER-ESTABLISHMENT TRANS MUSEUMS
40	OTHER-SPECIAL BRIDGE
41	OTHER-YOUTH CONSERVATION/SERVICE
42	OTHER-TRAINING
43	OTHER-UTILITIES
44	OTHER-OTHER
45	DEBT SERVICE
47	BRIDGE PRESERVATION
48	BRIDGE PROTECTION
49	BRIDGE INSPECTION AND RELATED TRAINING
50	NEW TUNNEL
51	TUNNEL REPLACEMENT
52	TUNNEL REHABILITATION
53	TUNNEL PRESERVATION
54	TUNNEL PROTECTION
55	TUNNEL INSPECTION AND RELATED TRAINING
56	OTHER ASSET INSPECTIONS

FHWA Type Code Descriptions

CODE	NAME	DESCRIPTION
01	New Construction	Construction of a new roadway that will not replace an existing roadway. A new roadway will provide: (1) a roadway where none existing, or (2) an additional and alternate roadway to an existing roadway will remain open and continue to serve through traffic.
03-4R	Reconstruction, Added Capacity	Construction on approximate alignment of an existing route where the old pavement structure is substantially removed and replaced. Such reconstruction includes widening to provide continuous additional through lane(s), or adding, or revising interchanges, replacing other highway elements such as a grade separation to replace an existing grade intersection. Also included, where necessary, are other incidental improvements such as drainage and shoulder improvements.
04-4R	Reconstruction, No added Capacity	Widening the lanes and/or shoulders of an existing roadway without adding through lanes. This may include reconstructing the existing pavement and other incidental improvements such as shoulder and drainage improvements.
05-4R	Resurfacing	Placement of additional surface material over the existing roadway to improve serviceability or to provide additional strength. There may be some upgrading of unsafe features and other incidental work in conjunction with resurfacing. Where surfacing is constructed by a separate project as a final stage of construction, the type of improvement should be the same as that of the preceding stage B new route, relocation, reconstruction, minor widening, etc.
06-4R	Restoration and Rehabilitation	Work required to return existing pavement (including shoulders) to a condition of adequate structural support or to a condition adequate for placement of an additional stage of construction. There may be some upgrading of unsafe features or other incidental work in conjunction with the restoration and rehabilitation. Typical improvements would include replacing spalled or malfunctioning joints; substantial pavement stabilization prior to resurfacing; grinding/grooving of rigid pavements; replacing deteriorated materials; reworking or strengthening bases or sub-bases, and adding under-drains.
07-4R	Relocation	Construction of a roadway at a new location that replaces an existing roadway. The new roadway carries all the through traffic with the previous facility closed or retained as a land-service road only.
08	New Bridge	Construction of a new bridge that does not replace or relocate an existing bridge.

*Projects using these Improvement Codes must report a National Bridge Inventory (NBI) Structure Number.

CODE	NAME	DESCRIPTION
*10	Bridge Replacement	Total replacement of a bridge with a new structure. The use of this code requires the reporting of the National Bridge Inventory (NBI) structure number in the "Bridge Number" data field.
*13	Bridge Rehabilitation	Major work required to restore the structural integrity of bridge as well as work necessary to correct major safety defects. If HBRRP funds are involved, the use of this code requires the reporting of the National Bridge Inventory (NBI) structure number in the "Bridge Number" data field.
**15	Preliminary Engineering	For the preparation of plans, specifications, and estimates (PS&E), traffic, and related studies including field inspections, surveys material testing and borings.
16	Right of Way	For purchase of land, improvements and easements, in addition to the cost of moving and relocating buildings, businesses, and persons.
**17	Construction Engineering	Oversight of construction of roadways, structures, and traffic service facilities including additional design work after construction project is let.

*Projects using these Improvement Codes must report a National Bridge Inventory (NBI) Structure Number.

**Transportation Enhancement Projects (Program Codes with fund source 33B0, Q220) must use these Improvement Codes.

CODE	NAME	DESCRIPTION
18	Planning	For Planning related purposes.
19	Research	For Research related purposes.
20	Environmental Only	For improvements that do not provide any increase in the level of service, in the condition of the facility or in safety features. Typical improvements, which would fall in this category, would be noise barriers, beautification and other environmentally related features not built as a part of any other improvement type. If environmental mitigation is needed as the result of a bridge project, and it is confined to the reasonable touchdown and the bridge itself, then it is allowable with HBRRP funds. Outside the reasonable touchdown would not be considered eligible.
21	Safety	For projects or a significant portion of a project that provides features or devices to enhance safety. For example, expenditures on projects designed to improve the safety of at-grade railroad crossings or for the construction of facilities dedicated to the enforcement of vehicle weight regulations.
22	Rail/Highway Crossing	Improvements to crossing warning Protective Devices such as signs, markings, and cross bucks; flashing light additions/improvements; and improvements to track circuitry.
23	Transit	For transit and transit-related purposes.
24	Traffic Management/Engineering – HOV	Traffic operation improvements that are designed to reduce traffic congestion and to facilitate the flow of traffic, both people and vehicles, on existing systems, or to conserve motor fuels. Include automated toll collection equipment, road and bridge surveillance and control systems, etc.
25	Vehicle Weight Enforcement Program	Vehicle Weight Enforcement Program
26	Ferry Boats	Ferry Boats
27	Administration	Administration for National Recreational Trails Projects, Commercial Vehicles, and other similar projects.
**28	Facilities for Pedestrians and Bicycles	For independent projects (not part of any other Federal-aid Highway project) to construct a facility to accommodate bicycle transportation and pedestrians.
**29	Acquisition of Scenic Easements and Scenic or Historic Sites	For projects consisting of easement and fee-simple purchase of sites of historic significance and/or considered worthy of preserving due their scenic qualities within the view shed of a transportation facility.
**30	Scenic or Historic Highway Programs	For projects consisting of scenic highway program and implementation activities not included in safety and other related improvements.

****Transportation Enhancement Projects (Program Codes with fund source 33B0, Q220) must use these Improvement Codes.**

CODE	NAME	DESCRIPTION
**31	Landscaping and Other Scenic Beautification	For projects involving landscaping and other scenic beautification through planting and related work. This includes vegetation management to assure the sustainability of landscape areas.
**32	Historic Preservation	For projects consisting of purchasing and restoring/rehabilitating a building, structure, or facility (other than transportation buildings, structures and facilities) that is directly related to the transportation system.
**33	Rehabilitation and Operation of Historic Transportation Buildings, Structures, or Facilities	For projects consisting of purchasing and restoring/rehabilitating, and/or operating transportation buildings, structures, or facilities considered to be of historic significance.
**34	Preservation of Abandoned Railway Corridors	For projects to preserve an abandoned railway corridor. It is expected that most of these projects will accommodate bicycle and pedestrian use. This code may be used for any railway corridor conversion project including those used by equestrians, skaters, and skiers. Not to be used for National Recreational Trails projects.
**35	Control and Removal of Outdoor Advertising	For projects to purchase outdoor advertising for permanent removal, to remove illegal outdoor advertising, or to develop an outdoor advertising control plan.
**36	Archeological Planning and Research	For projects involving the identification, evaluation, planning, and/or research of historic or archeological planning and research under Transportation Enhancements.
**37	Mitigation of Water Pollution due to Highway Runoff	
**38	Safety and Education for Pedestrians/Bicyclists	
**39	Establishment of Transportation Museums	
**40	Special Bridge	This category includes bridge inventory, inspection and classification and other special bridge projects, such as load posting, not covered by another type of improvement code
**41	Youth Conservation Service	
42	Training	Training, Supportive Services; TRAC; On the Job Training
43	Utilities	Utilities
44	Other	Miscellaneous work such as National Recreational Trails construction, noise barriers, etc.
45	Debt Service	Interest payments and retirement of principal under an eligible bond issue (including capitalized interest) and any other cost incidental to the sale of an eligible bond issue (including issuance costs, insurance or other credit enhancement fees, and other bond-related costs as determined).

*Projects using these Improvement Codes must report a National Bridge Inventory (NBI) Structure Number.

**Transportation Enhancement Projects (Program Codes with fund source 33B0, Q220) must use these Improvement Codes.

BRIDGE IMPROVEMENT TYPES				
Code	Name	Structure Number Required?	Definition	
			Highway Bridge Program Funds	MAP-21 Funds
40	Special Bridge	No	Includes bridge inventory, inspection and classification and other special bridge projects, such as load posting, not covered by another type of improvement code. Also includes application of calcium magnesium acetate, sodium acetate/formate, or other environmentally acceptable, minimally corrosive ant-icing and deicing compositions.	Includes low water crossing replacement, application of calcium magnesium acetate, sodium acetate/formate, or other environmentally acceptable, minimally corrosive anti-icing and deicing compositions, and other eligible bridge projects not covered by another type of improvement code.
47	Bridge Preservation	Yes	Preventative Maintenance activities that are a cost effective means of extending the service life of a bridge.	Activities that prevent, delay, or reduce deterioration of bridges or bridge elements, restore the function of existing bridges, keep bridges in good condition and extend their life.
48	Bridge Protection	Yes	Not Applicable	Includes scour countermeasures, seismic retrofits, impact protection measures, security countermeasures, and protection against extreme events.
49	Bridge Inspection and Related Training	No	Not Applicable	Bridge inspection and evaluation activities, including in-depth and special inspections. Bridge inspection related training.

TUNNEL IMPROVEMENT TYPES			
Code	Name	Structure Number Required?	MAP-21 Funds
50	New Tunnel	No	Construction of a new tunnel that does not replace or relocate an existing tunnel.
51	Tunnel Replacement	Yes	Total replacement of a tunnel with a new structure constructed with additional lanes in the same general traffic corridor.
52	Tunnel Rehabilitation	Yes	For the work required to restore structural integrity of a tunnel, as well as, work necessary to correct major safety defects.
53	Tunnel Preservation	Yes	Activities that prevent, delay, or reduce deterioration of tunnels or tunnel elements, restore the function of existing tunnels, keep tunnels in good condition and extend their life.
54	Tunnel Protection	Yes	Includes impact protection measures, security countermeasures, and protection against extreme events.
55	Tunnel Inspection and Related Training	No	Tunnel inspection and evaluation, including in-depth and other special inspections. Tunnel inspection training.

OTHER ASSETS IMPROVEMENT TYPES

(Including Signs, Earth Walls, & Drainage)

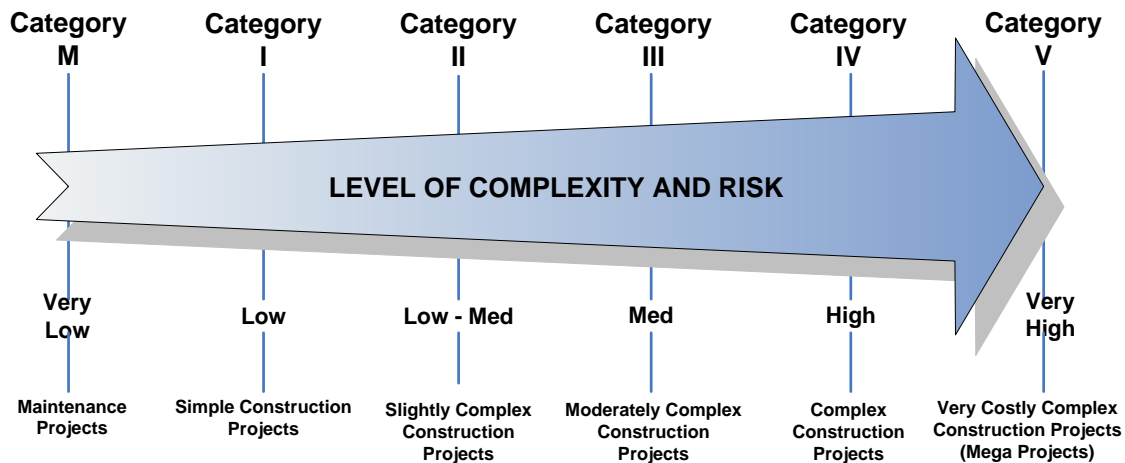
Code	Name	Structure Number Required?	MAP-21 Funds
56	Other Asset Inspections	No	Inspection and evaluation of infrastructure assets other than bridge or tunnels, including signs and sign-structures, earth retaining walls and drainage structures. Inspection related training for signs and sign-structure, earth retaining walls and drainage structures.

APPENDIX G – FEDERAL WORK CODES

<u>CODE</u>	<u>DESCRIPTION</u>
ALT	Alternates
BRAL	Bridge Alterations
BRRP	Bridge Replacement
DEMO	Demolition
DSSR	Deck Superstructure Replacement
ENVR	Environmental
GENL	General
MABR	Major Bridge Rehabilitation
MAWD	Major Widening
MCON	Minor Construction - City
MIBR	Minor Bridge Rehabilitation
MIWD	Minor Widening
NCON	New Construction
NCST	New Construction-Surface Treatment
NONE	No Supplemental Code
NWBR	New Bridge
PREL	Preliminary Studies Only
R&B	Roadway & Bridge
RCST	Reconstruction/Resurfacing
RDWY	Roadway
RECS	Reconstruction
RELC	Relocation
RPRS	Deck Super/Substructure Repairs
RSRF	Resurfacing
RSRH	Restoration & Rehabilitation
SAFT	Safety/Traffic/TMS

APPENDIX H – PROGRESS SCHEDULE CATEGORY

Projects undertaken by VDOT vary in size, complexity, and risk; therefore, a one-size fits all approach to project management is unsuitable. Hence, a project ranking system has been defined to group projects by category based primarily on level of complexity and risk. The categorization of projects allows for a statewide consistent approach to scheduling and to ensure that the appropriate scheduling provision is applied. This is necessary to ensure that the appropriate level of scheduling efforts needed to establish and maintain schedule control on the project is applied.



Project Category – Level of Complexity and Risk

The VDOT project ranking system consists of six categories representing varying levels of complexity and risk ranging from very low to very high. Category M is the lowest, which represents typical maintenance projects and schedule type work. Categories I through V represent typical construction projects ranging from simple to very complex. Characteristics of each project category are described as follows:

1. Category M – Category M is the lowest level of the project ranking system, which represents typical maintenance contracts and seasonal schedule type work of very low complexity and risk. For such projects, specific timeframes for accomplishing the work is not a major constraint. Generally, a full construction season is given to allow for flexibility in planning and scheduling the Work. Therefore, Category M projects do not require the level of scheduling efforts typically needed for construction projects.

A. Criteria for Category M Projects – Category M projects must generally meet the following criteria:

- i) Typical seasonal maintenance and schedule type work generally with contract duration of one construction season or less (Time is not a major constraint); or
- ii) Simple repairs or straight-forward maintenance work; and
- iii) Minimal traffic impact or limitations to the Work; and
- iv) No involvement with other major construction or improvement projects.

B. Examples of Category M Projects – The following are typical Category M projects:

- Pavement schedules (Asphalt overlay, surface treatments & slurry seals);
- Bridge joint repairs;
- Bridge painting (minimum traffic impact);
- Guardrail improvements;
- Curb and gutter repair/replacement;
- Raised pavement marker installation, lens replacement;
- Pavement marking schedules;
- Minor Bridge repair (District wide, minor miscellaneous);
- Rumble strip installation;
- Slope slide repair, scour repair;
- Ground mounted sign maintenance/replacement;
- Incidental concrete repair;
- Pipe culvert rehabilitation;
- Bridge cleaning;
- Retaining wall/ Sound wall repair;
- Signal maintenance & repair (District wide).

C. Category M Scheduling Requirements – Category M scheduling requirements are based on the basic scheduling information necessary for the Department to coordinate all work required to complete the Contract and to communicate with the public. The schedule information will also be used to plan for and manage the Department's cash flow, resources, and traffic. The Category M Schedule of Operations submission requirements are as follows:

- i) An Initial Plan of Operations in the form of a written narrative to provide a description of the overall plan and intended sequence of progress.
- ii) An Initial Schedule of Operations showing in a tabular format, the period of time within which work at each location, route, or segment of Work as delineated in the contract will be accomplished. A bar-chart or CPM schedule may be substituted, at the contractor's option.
- iii) Every week, on a day agreed to by the Contractor and the Engineer, the Contractor is required to provide a Two-week Look-ahead (TWLA) schedule to show the detailed schedule of work planned for the following two weeks. The TWLA schedule may be provided in a tabular or bar-chart format.

2. **Category I** – Category I is the lowest level of the project ranking system for typical construction projects, which represents small, simple, low risk, and short duration construction projects. Such projects involve limited and straight-forward operations with limited project constraints and minimal or no traffic impact.

A. Criteria for Category I Projects – Category I projects must generally meet the following criteria:

- i) Contract duration of one construction season or less (typically short durations); or
- ii) Estimated contract value of \$1 million or less; and
- iii) Limited items of work; and
- iv) Simple operations in familiar and favorable conditions; and
- v) Minimal traffic impact or limitations to the Work; and
- vi) Does not include utility adjustments or relocations; and
- vii) Contract does not contain any Special Provisions for special time-related conditions, such as Interim Contract Milestones, A+B Bidding, Insensitive/Disincentive, or Lane Rental; and
- viii) Project has no major materials delivery restrictions, environmental impacts, delayed right-of-way acquisitions or access, or other similar constraints and restrictions.

On a case by case basis, certain single-season simple and low risk projects with estimated contract value greater than \$1M that generally meet the criteria listed above may qualify as Category I, as determined by the Area Construction Engineer (ACE);

On a case by case basis, certain Federal Oversight (FO) maintenance projects or time sensitive maintenance projects with traffic impact may qualify as Category I, as determined by the ACE. Such projects may include concrete pavement repairs or overlay work on major corridors or certain relatively complex time sensitive maintenance projects that are involved with major construction or improvement projects. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

B. Examples of Category I Projects – The following are typical Category I projects:

- Rural grade, drain, & pave of unpaved roads (may include minor horizontal & vertical alignment changes and rural rustic projects with drainage work);
- Minor bridge deck repair & concrete overlay (may include multiple bridges);
- Break, seat, & overlay concrete pavement;
- Spot improvements (multiple locations any of: incidental concrete, minor widening, enhanced pavement marking, & sign installation);
- Building demolition in advance of construction projects;
- Retaining wall installation or extensive repair;
- Minor bridge substructure repairs (with traffic impact);
- Bridge painting (multiple locations or with traffic impact);
- Minor urban reconstruction & improvement (could include curb & gutter and sidewalks; new or extended turn lanes);
- Surface reclamation, sub-grade stabilization & overlays;
- Bridge steel repair (with traffic impact);
- Signal installation – Site specific (w/o intersection improvements, no regional on-call installations);

- Overhead sign installation & lighting installations (multiple locations & or significant amount of lighting);
- Simple concrete pavement repair and/or asphalt overlay (major corridor, minimum traffic impact).

C. Category I Scheduling Requirements – Category I scheduling requirements are based on the basic scheduling information needed to communicate the Contractor’s work plan and to assess progress of the Work. The schedule information will also be used to plan for and manage the Department’s resources, expenditures, traffic, as well as to communicate with the general public. The Category I Progress Schedule submission requirements are as follows:

- i) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.
- ii) A Baseline Progress Schedule showing in a tabular format, the times within which the individual activities that make up the project will be accomplished. A bar-chart or CPM schedule may be substituted, at the contractor’s option.
- iii) A Progress Earnings Schedule (Form C-13C) to show the planned progress for each month in terms of percent complete. Percent complete is based on cumulative anticipated earnings relative to the total contract value.
- iv) A two-week look-ahead schedule due every week to show the detail schedule for work planned for the following two weeks.
- v) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.

3. **Category II** – Category II represents slightly complex and relatively small to medium size construction projects that are typically completed in one or two construction seasons. Category II projects typically involve a limited number of straightforward contiguous, linear, or repetitive operations with typical project constraints and minimal traffic impact. Category II may also include certain multi-season low risk projects with minimal constraints or traffic impact. Such projects may involve simple repetitive or linear operations performed at multiple locations. They may also involve typical low risk widening projects in a rural setting, involving a limited number of straightforward contiguous or linear operations.

A. Criteria for Category II Projects – Category II projects must generally meet the following criteria:

- i) Contract duration of one construction season or less (may be two construction seasons, but involve simple linear or repetitive operations); or
- ii) Estimated contract value generally less than \$3 million; and
- iii) Limited number of straightforward contiguous or linear operations; and
- iv) Low to medium traffic impact; and
- v) Typical conditions and limitations to the work; and
- vi) May include minimal utility adjustments; and
- vii) Contract does not contain Special Provisions for special time-related conditions, such as Contract interim milestones, Incentives/Disincentives, A+B bidding, or Lane Rental, etc.; and
- viii) Project has no major materials delivery restrictions, environmental impacts, right-of-way acquisitions, or other similar constraints and restrictions.

On a case by case basis, certain slightly complex and low to medium risk projects with estimated contract value over \$3M that generally meet the criteria listed above may qualify as Category II, as determined by the ACE.

On a case by case basis, certain high-volume Federal Oversight (FO) maintenance projects or relatively complex maintenance projects that involve multiple items of work, multiple schedule constraints, or significant traffic impact may qualify as Category II, as determined by the ACE. Such projects may include concrete pavement repairs or overlay work on major corridors or certain relatively complex time sensitive maintenance projects that are involved with major construction or improvement projects. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

B. Examples of Category II Projects – The following are typical Category II projects:

- Urban grade, drain, & pave projects of low to medium complexity;
- Rural new construction or reconstruction grade separation roadway and bridge projects (low to medium size and complexity);
- Complex reconstruction and improvements, including widening and multiple turn lanes that may include utility adjustments;
- Major bridge substructure repairs (with low to medium traffic impact);
- Bridge deck replacements, such as multi-span or over railroads;
- Major bridge deck repair & concrete overlay (multi-span or over railroads);
- Intersection improvements with lighting and/or signal installation;
- Bridge & drainage structure replacements (frequently single span with limited approach work);
- Major drainage improvements;

- Complex concrete pavement repair and/or asphalt overlay (major corridor, significant traffic impact);
- Multi-season bridge painting (with low to medium traffic impact).

C. Scheduling Requirements for Category II – As the amount of work, project duration, or level of complexity and associated risks increases, a scheduling tool that can graphically depict the sequence and timing of the activities in a time-scale format is required to effectively communicate the Contractor's plan of operations and the intended sequence of progress. The Category II Progress Schedule submission requirements are as follows:

- i) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.
- ii) A Baseline Progress Schedule showing in a bar-chart format, the times within which the individual activities that make up the project will be accomplished. A CPM schedule may be substituted, at the contractor's option.
- iii) A Progress Earnings Schedule (Form C-13C) to show the planned progress for each month in terms of percent complete. Percent complete is based on cumulative anticipated earnings relative to the total contract value.
- iv) A monthly update of the Progress Schedule and Progress Earnings Schedule is required to show the actual progress and the current plan to complete the remaining work.
- v) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.

4. **Category III** – Category III represents moderately complex, medium risk, and medium-size projects that are typically completed within two or three construction seasons. Category III projects typically involve a limited number of concurrent operations with typical project constraints and/or traffic impact. Category III projects may also include certain medium to large size multi-season low risk projects of relative complexity. Such as limited span bridge widening or interchange projects in a rural setting with typical constraints and minimal traffic impact.

A. Criteria for Category III Projects – Category III projects must generally meet the following criteria:

- i) Med-size projects with contract duration generally spanning 2-3 construction seasons; or
- ii) Estimated contract value generally between \$3M and \$10M; and
- iii) Limited number of concurrent work-paths; and
- iv) Medium limitations to the work and traffic impact; and
- v) Limited number of utility adjustments; and
- vi) Contract does not contain Special Provisions for special time-related conditions, such as Contract interim milestones, Incentives/Disincentives, A+B bidding, or Lane Rental, etc.; and
- vii) Project has no major materials delivery restrictions, environmental impacts, right-of-way acquisitions, or other similar constraints and restrictions.

On a case by case basis, certain moderately complex and medium risk projects with estimated contract value over \$10M that generally meet the criteria listed above may qualify as Category III, as determined by the ACE.

On a case by case basis, certain high-volume Federal Oversight (FO) maintenance projects or relatively complex maintenance projects that involve multiple items of work, multiple schedule constraints, and/or significant traffic impact may qualify as Category III, as determined by the ACE. Such projects may include major concrete pavement repairs or overlay work on major corridors or certain relatively complex time sensitive maintenance projects that are involved with major construction or improvement projects. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

B. Examples of Category III Projects – The following are typical Category III projects:

- Intersection improvements, including widening and multiple turn lanes with utilities, lighting and/or signal installation (with medium complexity and traffic impact);
- New roadway/bridge construction or extension projects (medium size, complexity, and traffic impact);
- Bridge deck replacements (multi-span, medium traffic impact);
- Bridge & drainage structure replacements (limited span with approach work);
- Bridge reconstruction/widening projects (medium size, complexity, and traffic impact).

C. Scheduling Requirements for Category III – As the number of operations or level of complexity and associated risks grow a scheduling tool that allows for adequate planning and scheduling of multiple concurrent activities with considerations for associated project constraints is needed to execute and control the Work. Such scheduling method will require that sufficient details and activity relationships are added to establish inter-dependencies between related activities to form network paths, with which the activities are scheduled. This is necessary to aid the project staff in efficiently planning and managing the Work and available resources. It is also necessary that the project critical path and the minimum time needed to complete the project are established. The Category III Progress Schedule submission requirements are as follows:

- i) A Preliminary Progress Schedule to provide a start-up schedule to execute and monitor the Work for the first sixty (60) calendar days.
- ii) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.
- iii) A Baseline Progress Schedule showing in a CPM format, the times within which the individual activities that make up the project will be accomplished.
- iv) A Baseline Progress Earnings Schedule (Form C-13C) to show the planned progress for each month in terms of percent complete. Percent complete is based on anticipated earnings relative to the total contract value.
- v) A monthly update of the Progress Schedule and Progress Earnings Schedule is required to show the actual progress and the current plan to complete the remaining work.
- vi) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.

5. **Category IV** – Category IV represents complex, high risk, and medium to large size projects that are typically completed within three or more construction seasons. Category IV projects typically involve multiple concurrent operations with substantial project constraints and/or traffic impact. Such projects include, but are not limited to new, reconstruction, extension, or widening/improvements of medium to large roadway/bridge projects with substantial constraints and/or traffic impact. Category IV projects may also include certain med-size high-risk projects of relative complexity that include provisions for special time-related constraints or conditions as described below.

A. Criteria for Category IV Projects – Category IV projects must generally meet the following criteria:

- i) Medium to large size projects with contract duration generally spanning 3 or more construction seasons; or
- ii) Estimated contract value generally between \$10M and \$75M; or
- iii) Contract contain Special Provisions for special time-related conditions, such as Contract interim milestones, Incentives/Disincentives, A+B bidding, or Lane Rental, etc.; and
- iv) Multiple concurrent work-paths; and
- v) Complex construction staging, phasing, or MOT issues; and
- vi) Complex constructability issues; and
- vii) Substantial traffic impact and limitations to the work; or
- viii) May include major utility relocation/adjustments; and
- ix) Project has no major materials delivery restrictions, environmental impacts, right-of-way acquisitions, or other similar constraints and restrictions.

On a case by case basis, certain relatively complex and high risk projects with estimated contract value less than \$10M that generally meet the criteria listed above may qualify as Category IV, as determined by the ACE. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

On a case by case basis, certain relatively complex and high risk projects with estimated contract value over \$75M that generally meet the criteria listed above may qualify as Category IV, as determined by the ACE.

B. Examples of Category IV Projects – The following are typical Category IV projects:

- Major urban intersection improvements, including widening and multiple turn lanes with utilities, lighting and/or signal installation (medium to large size, complex, and significant traffic impact);
- Rural/Urban new construction or reconstruction grade separation roadway and bridge projects (medium to large size, complex, major corridor);
- Major bridge deck replacements (substructure repairs, multi-span, multi-lane, major corridor, with significant traffic impact);
- Major bridge & drainage structure replacements (multi-span with extensive approach work);
- Major widening projects (medium to large size and complexity, major corridor, with significant traffic impact).

C. Scheduling Requirements for Category IV – As the size, complexity, and associated risks grow, a scheduling tool that allows for adequate planning and scheduling of multiple concurrent operations is needed to execute and control the Work. For such projects, a tool that allows for an accurate assessment of the reasonableness of the schedule and current status of the activities and the project based on costs is also needed to control the project and to manage schedule-related risks on the project. The Category IV scheduling and Progress Schedule submission requirements are based on the Category III requirements with additional requirements as described below:

- i) A Preliminary Progress Schedule to provide a start-up schedule to execute and monitor the Work for the first ninety (90) calendar days.
- ii) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.
- iii) A cost-loaded Baseline Progress Schedule showing in a CPM format, the times within which the individual activities that make up the project will be accomplished. The cost-loaded schedule will be used to generate the time-distributed cost data on which the Progress Earnings Schedule is based.
- iv) A Baseline Progress Earnings Schedule (Form C-13CPM) based on time-distributed cost data generated from the cost-loaded schedule to show the planned progress for each month in terms of percent complete. Percent complete is based on anticipated earnings relative to the total contract value.
- v) A 30-day look-ahead schedule to depict work planned for the next period.
- vi) A monthly update of the Progress Schedule is required to show the actual progress and the current plan to complete the remaining work.
- vii) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.

- 6. Category V** – Category V is the highest level of the project ranking system for typical construction projects, which represents very complex and very costly mega-projects that are typically completed within four or more construction seasons. Category V projects typically involve very large multiple multi-phased contracts with substantial project constraints and/or significant traffic impact. Such projects typically involve major roadway/bridge construction/widening, very complex multiple-span bridges, tunnels, or major interchange work on major corridors.

A. Criteria for Category V Projects – Category V projects must generally meet the following criteria:

- i) Very large projects with contract duration generally spanning 3 or more construction seasons; or
- ii) Estimated contract value generally greater than \$75M; and
- iii) Contract contain Special Provisions for special time-related conditions, such as Contract interim milestones, Incentives/Disincentives, A+B bidding, or Lane Rental, etc.; and
- iv) Considerable number of concurrent work-paths; and
- v) Complex construction staging, phasing, or MOT issues; and
- vi) Complex constructability issues; and
- vii) Substantial traffic impact and limitations to the work; and
- viii) Substantial number of right-of-way acquisitions and/or relocations; or
- ix) Major material delivery restrictions; or
- x) Significant utility relocation/adjustments; or
- xi) Major environmental or community impact.

On a case by case basis, certain relatively complex and very high risk projects with estimated contract value less than \$75M that generally meet the above listed criteria may qualify as Category V, as determined by the ACE. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

B. Examples of Category V Projects – The following are typical Category V projects:

- Major rural/urban new construction or reconstruction grade separation roadway and bridge projects (large size, complex, major corridor, significant traffic impact);
- Major widening projects (large size, complex, major corridor, significant traffic impact);
- Major interchange projects (large size, complex, major corridor, significant traffic impact);
- Major bridge deck replacement projects (large size or multiple bridges, complex, major corridor, significant traffic impact);
- Individual Category III or IV level projects that are included in multiple-contract mega-projects like Woodrow Wilson, Springfield Interchange, etc.).

C. Scheduling Requirements for Category V – As the size, complexity, and associated risks grow, a scheduling tool that will allow for adequate planning and scheduling of multiple concurrent operations, projects, manpower, equipment, and expenditures is required to accomplish the Work. Such scheduling tool should also allow for an accurate assessment of the status of the individual activities and the project; as well as progress of selected major operations that will have the greatest influence on the schedule.

The Category V scheduling and Progress Schedule submission requirements are based on the Category IV requirements with additional requirements as described below:

- i) A qualified and dedicated project scheduler/coordinator to coordinate all scheduling meetings and issues.

- ii) Contractor's working on a Category V project will be required to develop and maintain their schedules in a collaborative environment within the VDOT scheduling database.
- iii) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.
- iv) A Preliminary Progress Schedule to provide a start-up schedule to execute and monitor the Work for the one hundred and twenty (120) calendar days.
- v) A cost-loaded and resource-loaded Baseline Progress Schedule showing in a CPM format, the times within which the individual activities that make up the project will be accomplished. The cost-loaded schedule will be used to generate the time-distributed cost data on which the Progress Earnings Schedule is based.
- vi) A Baseline Progress Earnings Schedule (Form C-13CPM) based on time-distributed cost data generated from the cost-loaded schedule to show the planned progress for each month in terms of percent complete. Percent complete is based on anticipated earnings relative to the total contract value.
- vii) A Commodity Progress Report (Form C-13COM) to show the anticipated progress of selected items of work, whose rate of progress will have the greatest influence on the schedule.
- viii) A weekly four-week look-ahead schedule detailing work planned for the next four weeks.
- ix) A monthly update of the Progress Schedule is required to show the actual progress and the current plan to complete the remaining work.
- x) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.